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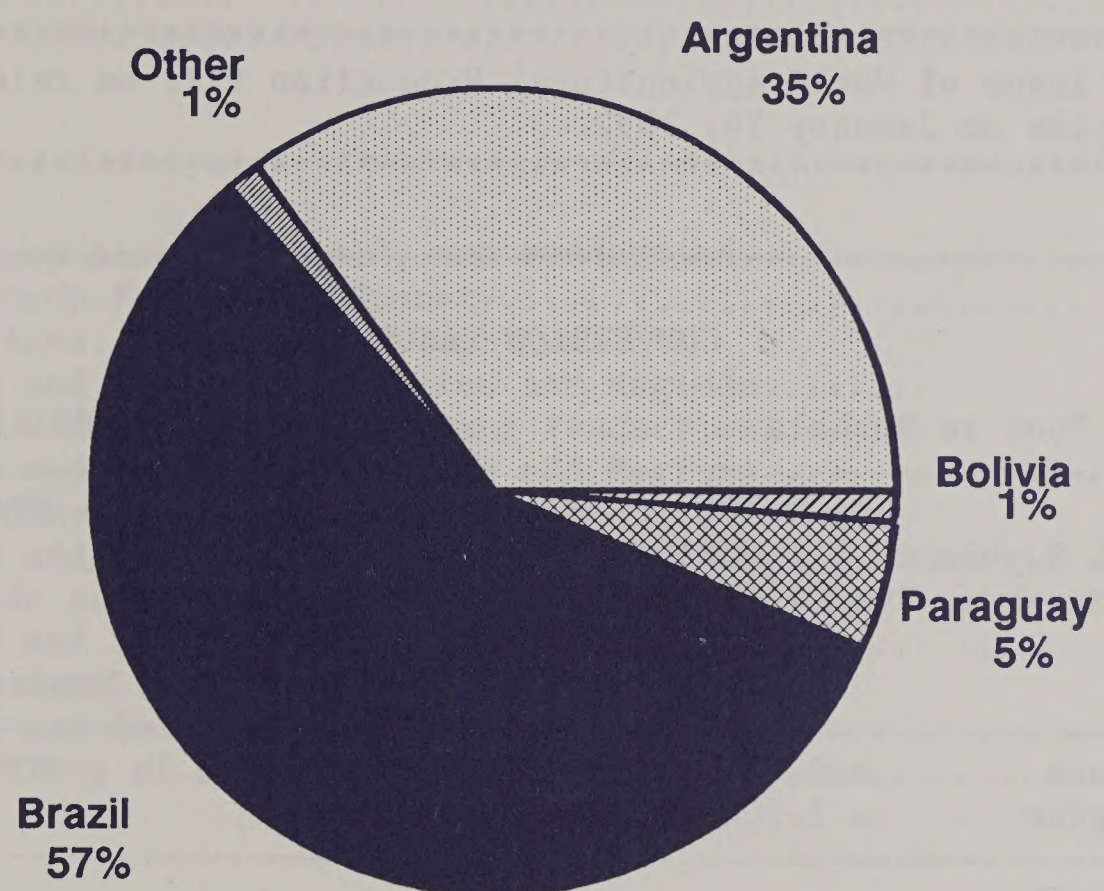
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WAP 12-91  
December 1991

# World Agricultural Production

## South American 1992 Soybean Production



### Production Articles This Month...

- South American Soybeans
- Tobacco Prospects for 1992
- Mongolian Agricultural Situation
- Soviet Sunflower
- World Citrus
- World Tobacco
- World Coffee
- Plus: Special Index of This Year's Feature Articles

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## PRODUCTION HIGHLIGHTS FOR 1991/92

December 1991

**WHEAT:** World production for 1991/92 is estimated at 545.4 million tons, down 2.0 million, or less than 1 percent from last month and down 8 percent from last year. Total foreign production is estimated at 491.5 million tons, down 2.0 million or less than 1 percent from last month and down 5 percent from last year. Country highlights are as follows:

- o United States      Production is estimated at 53.9 million tons, unchanged from last month and down 28 percent from last year.
- o Eastern Europe      Production is estimated at 39.2 million tons, down 1.5 million or 4 percent from last month's estimate and down 5 percent from last year's harvest. The decrease is due to reduced production in Romania, which more than offset increased Polish production. Excessive rainfall, lack of machinery and parts, and a critical shortage of inputs, particularly protection chemicals, contributed to the decline in Romanian production.
- o Argentina          Production is estimated at 8.5 million tons, down 0.5 million or 6 percent from last month and down 19 percent from last year. Decreases in planted area account for the lower production.
- o Chile                Production is estimated at 1.5 million tons, down 0.2 million or 9 percent from last month and down 3 percent from last year. Higher planted area in 1991/92 will not offset the decline in yields.
- o Canada              Production is estimated at a record 32.8 million tons, down 0.2 million, or 1 percent from last month, but up marginally from last year. Statistics Canada indicated a decrease in area resulted in lower output despite slightly higher yields.
- o South Africa      Production is estimated at 2.3 million tons, up 0.2 million, or 8 percent from last month and up 34 percent from last year. The hot, dry weather since mid-November assisted with the ripening and harvest of the crop in the Orange Free State.

**COARSE GRAINS:** World production for 1991/92 is estimated at 803.8 million tons, up 2.2 million, a marginal increase from last month, but down 4 percent from last year. Total foreign production is estimated at 585.0 million tons, up 2.2 million, or less than 1 percent from last month, but down 3 percent from last year. Country highlights are as follows:



- o    United States    Production is estimated at 218.7 million tons, unchanged from last month and down 5 percent from last year.
- o    China    Production is estimated at 110.6 million tons, up 4.0 million or 4 percent from last month, but down 3 percent from last year. The corn production estimate was increased to 95.0 million tons, up 4 million from last month and close to last year's record crop. Expanded use of hybrids and excellent harvest weather in the major corn growing provinces led to higher than expected yields.
- o    EC-12    Production is estimated at 88.3 million tons, up 0.2 million, or less than 1 percent from last month and up 5 percent from last year. An increase in yields of barley in France and sorghum, rye, oats, and mixed grains in Spain accounted for the rise.
- o    Canada    Production is estimated at 22.7 million tons, down 0.8 million or 3 percent from last month and down 11 percent from last year. Based on Statistics Canada, production estimates for barley, oats, and rye were lowered, while estimates for corn rose to a record level.
- o    Australia    Production is estimated at 6.4 million tons, down 0.6 million or 8 percent from last month and down 5 percent from last year. The reduction is due to drought in northeast barley and oats growing areas. Strong barley production prospects are still forecast for the primary growing regions of South Australia, Victoria, and Western Australia.
- o    Mexico    Production is estimated at 17.5 million tons, down 0.5 million or 3 percent from last month and down 4 percent from last year. The reduction is due to a decrease in sorghum harvested area and consequently production, especially in the Bajio region.
- o    Eastern Europe    Production is estimated at 61.3 million tons, down 0.3 million or less than 1 percent from last month, but up 17 percent from last year's drought-reduced harvest. The decrease is due primarily to reduced production of Romanian barley and Polish oats, which more than offset increased Polish corn and Yugoslav barley production.



**RICE (MILLED-BASIS):** World production for 1991/92 is estimated at 344.9 million tons, down 0.7 million or less than 1 percent from last month and down 2 percent from last year's record crop. Total foreign production in 1991/92 is estimated at 339.9 million tons, down 0.7 million or slightly below last month's estimate and down 7.3 million or 2 percent from 1990/91. Country highlights are as follows:

- o **United States** Production is estimated at 5.0 million tons, unchanged from last month and down marginally from last year.
- o **Japan** Production is estimated at 8.8 million tons, down 0.6 million or 7 percent from last month and down 8 percent from last year. The estimate was reduced due to extremely poor weather during the harvest season and slightly lower area. Since September, Japan has been hit by heavy rainfall, below-normal temperatures, and two typhoons that seriously damaged many crops, including rice.

**OILSEEDS:** Total world oilseeds production during 1991/92 is forecast at a record 222.5 million tons, up marginally from last month and up 2 percent from 1990/91. Foreign production during 1991/92 is forecast to be a record 158.8 million tons, up 0.1 million or less than 1 percent from last month and up 1 percent from last year. Total oilseed production in the United States is forecast at 63.7 million tons, down 0.1 million or less than 1 percent from last month, but up 5 percent from last year.

\* **Soybeans:** World production for 1991/92 is forecast at 105.1 million tons, down 0.2 million or less than 1 percent from last month, but up 2 percent from last year. Total foreign soybean output is forecast at 51.7 million tons, down 0.2 million or less than 1 percent from last month, but up 2 percent from 1990/91. Country highlights are as follows:

- o **United States** Production is estimated at 53.4 million tons, unchanged from last month, but up 2 percent from last year. The National Agricultural Statistics Service, USDA, estimates harvested area at 23.7 million hectares, up 4 percent from 1990/91.
- o **China** Production is estimated at 10.1 million tons, up 0.1 million or 1 percent from last month, but down 8 percent from last year. Official Chinese sources report that production losses from flooding this summer were not as large as earlier estimated.
- o **India** Production is estimated at 2.3 million tons, down 0.4 million or 15 percent from last month and down 6 percent from last year's record harvest. Area and yield expectations were lowered this month, but 1991/92 area is estimated up 5 percent over last year, continuing the expansion of this non-traditional oilseed in central India.



- o Canada Production is estimated at a record 1.4 million tons, up 0.2 million or 14 percent from last month and up 9 percent from last year. Statistics Canada indicated a higher than anticipated yield and a record harvested area.
- \* Cottonseed: World production for 1991/92 is forecast at 34.6 million tons, down 0.3 million or 1 percent from last month, but up 3 percent from last year. Total foreign production is forecast at 28.3 million tons, down 0.3 million or 1 percent from last month, but up less than 1 percent from last year. Country highlights are as follows:
  - o United States Production is estimated at 6.3 million tons, down 80,000 or 1 percent from last month, but up 16 percent from 1990/91. Official estimates by the National Agricultural Statistics Service this month decreased expected harvested area marginally to 5.4 million hectares, up nearly 14 percent from last year.
  - o India Production is estimated at 4.1 million tons, down 0.2 million or 5 percent from last month, but up 5 percent from last year's disappointing crop. Harvested area is estimated down slightly from last year, but cotton yields are expected to rise owing to more favorable weather conditions in 1991/92.
  - o Australia Production is estimated at 0.6 million tons, down 0.1 million or 14 percent from last month and down 14 percent from last year. Cotton area and yield are forecast to decline owing to continued drought conditions in the primary growing zone of eastern Australia.
- \* Peanuts: World production for 1991/92 is forecast at 23.3 million tons, down 0.2 million or 1 percent from last month, but up 2 percent from 1990/91. Total foreign production is forecast at 21.1 million tons, down 0.2 million or 1 percent from last month and down 1 percent from last year. Country highlights are as follows:
  - o United States Production is estimated at a record 2.2 million tons, unchanged from last month, but up 37 percent from 1990/91. The National Agricultural Statistics Service expects average yield to recover from last year's level and pegs harvested area at 795,000 hectares, up nearly 9 percent from 1990/91.
  - o India Production is estimated at 8.0 million tons, down 0.2 million or 2 percent from last month and down 1 percent from last year's drought affected crop. Peanut area is forecast slightly above last year's level, while yields declined owing to severe drought in Gujarat.



- \* **Sunflowerseed:** World production for 1991/92 is forecast at 21.6 million tons, up 0.2 million or 1 percent from last month, but down 4 percent from 1990/91. Total foreign production is forecast at 20.1 million tons, up 0.2 million or 1 percent from last month, but down 7 percent from last year. Country highlights are as follows:
- o **United States** Production is estimated at 1.5 million tons, unchanged from last month, but up 45 percent from last year. NASS estimates harvested area at 1.0 million hectares, up 37 percent from 1990/91.
  - o **EC-12** Production is estimated at 4.1 million tons, up 70,000 or 2 percent from last month, but down 4 percent from last year. Higher than anticipated area and yields in Italy increased output.
  - o **China** Production is estimated at 1.3 million tons, up 0.1 million or 9 percent from last month, but down 7 percent from last year. Very favorable weather in the major sunflowerseed producing provinces led to above average yields.
- \* **Rapeseed:** World production for 1991/92 is forecast at a record 27.8 million tons, up 0.6 million or 2 percent from last month and up 10 percent from last year. Total foreign production is forecast at 27.7 million tons, up 0.6 million or 2 percent from last month and up 9 percent from last year. Country highlights are as follows:
- o **United States** Production is estimated at 105,000 tons, unchanged from last month, but nearly double that of last year. Area and production data for 1987/88 through the initial 1991/92 forecast are estimates from the Inter-agency Oilseeds Committee and the World Agricultural Outlook Board. The National Agricultural Statistics Service, USDA, is expected to announce its U.S. rapeseed area estimates in January 1992.
  - o **EC-12** Production is estimated at 7.4 million tons, up 0.1 million or 1 percent from last month and up 20 percent from last year. An increase in Germany's yield more than offset a decrease in Denmark's harvested area and yield.
  - o **India** Production is estimated at 5.4 million tons, up 0.4 million or 8 percent from last month and unchanged from last year's record crop. Rapeseed area is forecast to rise by 2 percent owing to oilseed price incentives and diversion of some wheat areas into rapeseed.
  - o **Canada** Production is estimated at 4.3 million tons, up 0.1 million or 2 percent above last month and up 31 percent from last year. The near record crop stems from a 27 percent increase in area.



- \* Flaxseed: World production for 1991/92 is forecast at 2.0 million tons, down marginally from last month and down 13 percent from last year. While production in the United States is small, this year's output is expected to increase by 18 percent over last year to 114,000 tons. Total foreign production is pegged at 1.9 million tons, down marginally from last month and down 14 percent from 1990/91. There were no significant country changes this month.
- \* Copra: World production for 1991/92 is forecast at 4.6 million tons, unchanged from last month, but down 3 percent from last year. Copra production reached a record 5.3 million tons in 1985/86. There were no country changes this month.
- \* Palm Kernels: World production for 1991/92 is forecast at a record 3.6 million tons, unchanged from last month, but up 9 percent from last year. There were no country changes this month.
- \* Palm Oil: World production for 1991/92 is forecast at a record 11.9 million tons, unchanged from last month, but up 8 percent from last year. There were no country changes this month.

COTTON: World cotton production in 1991/92 is projected at a record 90.5 million bales. This estimate is down 1.1 million bales or 1 percent from last month, but up 3.5 million bales or 4 percent from 1990/91. This estimate remains above the previous record of 89.0 million bales harvested in 1984/85. Total foreign production is projected at 72.5 million bales, down 0.9 million bales or 1 percent from last month, but is a gain of 1 percent over 1990/91 and second only to the 1984/85 record crop of 76.0 million bales. Country highlights are as follows:

- o United States Production is estimated at 18.0 million bales, down 0.2 million or 1 percent from last month, but 16 percent above last year. If realized, this will be the largest crop since 1937/38 when output hit 18.9 million bales. Cold wet weather during the late season crop development stage reduced yield prospects in Texas and Oklahoma, while improved conditions in several states, mainly California and Mississippi, increased output. The increase in these two states along with smaller increases in others partially offset the drop in output for Texas.
- o India Production is estimated at 9.5 million bales, down 0.5 million or 6 percent from last month, but up 3 percent from last year's rain-damaged crop. Cotton yield is estimated down this month owing to drought effects in important central Indian growing states. Harvested area is also estimated down slightly due to reduced plantings in the drought affected states.



- o    Australia                      Production is estimated at 1.7 million bales, down 0.2 million or 13 percent from last month and down 17 percent from last year's record harvest. Cotton area is estimated down owing to a loss of dryland plantings, while yield is estimated down due to drought effects and potential irrigation supply shortages.
- o    Paraguay                      Production is forecast at 1.1 million bales, down 0.1 million or 9 percent from last month and down 12 percent from last year. Planted area is projected to decrease as producers respond to unfavorable government price supports, expensive credit, and low world cotton prices.
- o    Pakistan                      Production is estimated at a record 8.0 million bales, up 0.2 million or 3 percent from last month and up 6 percent from last year. Cotton area and yield are estimated above 1990/91 levels, as strong domestic demand influenced growers to expand production and use higher levels of crop inputs.



# U.S. Crop Acreage, Yield, and Production 1/

1/ All estimates are from the USDA, National Agricultural Statistics Service (NASS) and are published in the Crop Production circular available from NASS.



TABLE 2

## World Crop Production Summary

Commodity	World	Total Foreign	North America			Europe		USSR	Asia					South America		Selected Other			All Other Countries	
			United States	Canada	Mexico	EC-12	Oth. W. Europe		Eastern Europe	China	India	Indonesia	Paki- stan	Thai- land	Argen- tina	Brazil	Aus- tralia	South Africa		Turkey
—Million Metric Tons—																				
<u>Wheat</u> 1989/90 1990/91 prel. 1991/92 proj. November December	537.9	482.4	55.4	24.6	4.0	82.0	4.4	40.7	92.3	90.8	54.1	0.0	14.4	0.0	10.2	5.6	14.2	2.0	12.5	15.4
	593.1	518.6	74.5	32.7	3.9	84.6	5.1	41.1	108.0	98.2	49.7	0.0	14.3	0.0	10.5	3.2	15.1	1.7	15.0	17.7
	547.4	493.5	53.9	33.0	3.7	90.3	4.0	40.7	78.0	96.0	54.0	0.0	14.5	0.0	9.0	3.2	10.0	2.1	16.0	18.1
	545.4	491.5	53.9	32.8	3.7	90.4	4.1	39.2	78.0	96.0	54.0	0.0	14.5	0.0	8.5	3.2	10.0	2.3	16.0	17.9
<u>Coarse Grains</u> 1989/90 1990/91 prel. 1991/92 proj. November December	802.7	581.3	221.4	23.5	14.1	89.8	12.4	60.2	104.8	93.5	34.6	5.0	2.7	4.3	8.3	22.5	6.9	9.5	7.5	81.7
	833.4	602.7	230.7	25.4	18.4	84.1	13.7	52.2	113.3	113.5	33.3	5.2	2.9	4.1	11.2	24.2	6.7	8.8	8.9	77.0
	801.5	582.8	218.7	23.5	18.0	88.2	12.0	61.5	85.5	106.6	31.5	5.2	2.5	4.0	10.5	26.7	6.9	8.6	9.7	81.9
	803.8	585.0	218.7	22.7	17.5	88.3	12.1	61.3	85.5	110.6	31.5	5.2	2.5	4.0	10.5	26.7	6.4	8.6	9.7	82.0
<u>Rice (Milled)</u> 1989/90 1990/91 prel. 1991/92 proj. November December	344.5	339.4	5.1	0.0	0.4	1.4	0.0	0.1	1.7	126.1	74.1	29.1	3.2	13.3	0.2	4.9	0.6	0.0	0.2	23.1
	352.3	347.2	5.1	0.0	0.2	1.6	0.0	0.1	1.6	132.5	74.6	29.4	3.3	11.4	0.2	6.3	0.6	0.0	0.2	23.7
	345.6	340.6	5.0	0.0	0.2	1.5	0.0	0.1	1.4	129.5	71.5	28.7	3.3	13.2	0.2	6.8	0.8	0.0	0.1	23.2
	344.9	339.9	5.0	0.0	0.2	1.5	0.0	0.1	1.4	129.5	71.5	28.7	3.3	13.2	0.2	6.8	0.8	0.0	0.1	23.2
<u>Total Grains 1/</u> 1989/90 1990/91 prel. 1991/92 proj. November December	1,685.1	1,403.2	281.9	48.0	18.5	173.2	16.8	101.0	198.8	310.4	162.7	34.1	20.4	17.6	18.7	33.0	21.7	11.5	20.2	196.6
	1,778.7	1,468.5	310.2	58.1	22.5	170.3	18.7	93.5	222.9	344.2	157.5	34.6	20.5	15.5	22.0	33.7	22.3	10.5	24.1	197.8
	1,694.6	1,416.9	277.7	56.5	21.9	179.9	16.0	102.4	164.9	332.1	157.0	33.9	20.3	17.2	19.7	36.7	17.7	10.7	25.9	204.2
	1,694.1	1,416.4	277.7	55.5	21.4	180.2	16.2	100.6	164.9	336.1	157.0	33.9	20.2	17.2	19.2	36.7	17.2	10.9	25.9	203.4
<u>Oilseeds 2/</u> 1989/90 1990/91 prel. 1991/92 proj. November December	214.1	154.8	59.3	4.9	1.4	11.5	0.7	5.2	13.8	28.5	19.3	2.2	3.3	0.9	15.8	21.8	0.7	1.0	2.3	21.5
	217.6	157.0	60.6	5.6	1.0	13.1	0.7	4.3	13.0	33.3	21.0	2.2	3.6	0.7	16.1	17.0	2.0	1.0	1.9	20.3
	222.4	158.7	63.7	6.2	1.1	13.6	0.7	4.2	12.1	32.5	21.5	2.2	3.8	0.7	15.5	19.1	1.0	1.0	1.6	21.9
	222.5	158.8	63.7	6.5	1.1	13.7	0.7	4.2	12.1	32.7	21.1	2.2	3.9	0.7	15.5	19.1	0.9	1.0	1.6	21.8
<u>Cotton</u> 1989/90 1990/91 prel. 1991/92 proj. November December	80.0	67.8	12.2	0.0	0.8	1.5	0.0	0.1	12.3	17.4	10.6	0.0	6.7	0.1	1.3	3.0	1.4	0.3	2.8	9.5
	87.1	71.6	15.5	0.0	0.8	1.4	0.0	0.1	12.0	20.7	9.1	0.0	7.5	0.1	1.4	3.2	2.0	0.2	3.0	10.0
	91.6	73.4	18.2	0.0	0.9	1.3	0.0	0.1	11.0	22.0	10.0	0.0	7.8	0.2	1.5	3.5	1.9	0.3	2.7	10.3
	90.5	72.5	18.0	0.0	0.8	1.3	0.0	0.1	11.0	22.0	9.5	0.0	8.0	0.2	1.5	3.5	1.7	0.3	2.7	10.2

1/ Includes total of wheat, coarse grains, and rice (milled) shown above. Estimates of Soviet total grain production, including wheat, coarse grains, rice (rough), minor grains and pulses are 210.9 million tons in 1989/90, 235.0 million in 1990/91, and 175.0 million projected for 1991/92.

2/ Totals for major regions and countries include the six major oilseeds shown elsewhere in this report, while world and total foreign also includes copra and palm kernels for all countries.

Note: Entries of 0.0 indicate no reported or insignificant production.

December 1991

Production Estimates and Crop Assessment Division, FAS, USDA



TABLE 3

## Wheat Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1991/92 1990/91	Proj. Nov.	Proj. Dec.	Prel. 1989/90	1991/92 1990/91	Proj. Nov.	Proj. Dec.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	226.4	232.1	223.3	2.38	2.56	2.45	2.44	537.9	593.1	547.4	545.4
United States	25.2	28.0	23.3	2.20	2.66	2.31	2.31	55.4	74.5	53.9	53.9
Total Foreign	201.3	204.1	199.9	2.40	2.54	2.47	2.46	482.4	518.6	493.5	491.5
Maj. Foreign Exporters	45.1	45.8	43.9	2.91	3.12	3.22	3.23	131.0	142.9	142.3	141.7
Argentina	5.5	5.7	4.5	1.86	1.84	1.84	1.89	10.2	10.5	9.0	8.5
Australia	9.0	9.2	7.8	1.58	1.63	1.28	1.28	14.2	15.1	10.0	10.0
Canada	13.6	14.4	14.5	1.80	2.27	2.24	2.26	24.6	32.7	33.0	32.8
EC-12	17.0	16.5	17.1	4.83	5.14	5.39	5.28	82.0	84.6	90.3	90.4
Major Importers	96.6	98.4	95.8	2.48	2.66	2.42	2.40	239.1	261.4	231.7	230.2
Brazil	3.4	3.3	2.4	1.65	0.97	1.33	1.33	5.6	3.2	3.2	3.2
China	29.8	30.8	30.9	3.04	3.19	3.10	3.10	90.8	98.2	96.0	96.0
Eastern Europe	9.8	9.7	10.0	4.14	4.22	4.11	3.93	40.7	41.1	40.7	39.2
Egypt	0.6	0.7	0.8	5.05	5.79	6.40	6.40	3.2	4.3	4.8	4.8
Other N. Africa 1/	4.9	5.4	5.6	1.14	1.04	1.50	1.50	5.6	5.7	8.3	8.4
Japan	0.3	0.3	0.2	3.47	3.66	2.93	2.93	1.0	1.0	0.7	0.7
USSR	47.7	48.2	46.0	1.94	2.24	1.70	1.70	92.3	108.0	78.0	78.0
Other Foreign	59.7	59.8	60.1	1.88	1.91	1.99	1.99	112.3	114.3	119.5	119.6
India	24.1	23.5	24.3	2.24	2.12	2.22	2.22	54.1	49.7	54.0	54.0
Iran	6.8	6.5	6.2	0.81	1.08	1.15	1.15	5.5	7.0	7.1	7.1
Mexico	1.0	1.0	0.9	4.21	4.11	4.20	4.20	4.0	3.9	3.7	3.7
Non-EC W. Europe	0.8	0.9	0.8	5.18	5.41	5.18	5.22	4.4	5.1	4.0	4.1
Pakistan	7.7	7.8	8.0	1.87	1.82	1.82	1.82	14.4	14.3	14.5	14.5
South Africa	1.8	1.6	1.4	1.11	1.10	1.48	1.61	2.0	1.7	2.1	2.3
Turkey	8.7	8.8	8.9	1.44	1.71	1.80	1.80	12.5	15.0	16.0	16.0
Others	8.7	9.8	9.8	1.77	1.79	1.84	1.83	15.4	17.7	18.1	17.9

1/ Algeria, Libya, Morocco, and Tunisia.

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TABLE 4  
Coarse Grains Area, Yield, and Production  
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1991/92 1990/91	Proj. Nov.	Proj. Dec.	Prel. 1989/90	1991/92 1990/91	Proj. Nov.	Proj. Dec.
<b>TOTAL COARSE GRAINS</b>	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World 1/	323.0	317.9	321.7	2.49	2.62	2.49	2.50	802.7	833.4	801.5	803.8
United States	37.0	36.4	37.3	5.98	6.34	5.87	5.87	221.4	230.7	218.7	218.7
Total Foreign	285.9	281.5	284.4	2.03	2.14	2.05	2.06	581.3	602.7	582.8	585.0
Maj. Foreign Exporters	21.1	20.3	20.9	2.49	2.77	2.50	2.50	52.5	56.2	53.5	52.1
Argentina	3.2	3.3	3.7	2.64	3.43	2.88	2.88	8.3	11.2	10.5	10.5
Australia	3.9	4.1	4.8	1.77	1.64	1.45	1.32	6.9	6.7	6.9	6.4
Canada	8.3	7.6	6.9	2.84	3.32	3.15	3.29	23.5	25.4	23.5	22.7
South Africa	4.2	3.8	4.0	2.24	2.34	2.15	2.15	9.5	8.8	8.6	8.6
Thailand	1.6	1.5	1.5	2.78	2.65	2.65	2.65	4.3	4.1	4.0	4.0
Major Importers	103.8	99.8	101.9	2.73	2.84	2.63	2.61	282.9	283.2	266.7	266.2
Eastern Europe	16.5	15.9	16.4	3.66	3.28	3.81	3.74	60.2	52.2	61.5	61.3
EC-12	20.3	19.3	19.2	4.43	4.35	4.60	4.61	89.8	84.1	88.2	88.3
Other W. Europe	3.1	3.0	2.9	3.98	4.49	4.19	4.24	12.4	13.7	12.0	12.1
Mexico	7.5	8.2	8.9	1.88	2.23	2.09	1.97	14.1	18.4	18.0	17.5
USSR	56.0	52.9	54.2	1.87	2.14	1.58	1.58	104.8	113.3	85.5	85.5
Other Major Import. 2/	0.4	0.4	0.4	3.83	3.63	3.70	3.70	1.6	1.5	1.5	1.5
Other Foreign	161.0	161.4	161.6	1.53	1.63	1.63	1.65	245.8	263.4	262.6	266.7
Brazil	12.5	13.5	13.5	1.79	1.79	1.98	1.98	22.5	24.2	26.7	26.7
China	28.2	29.1	29.1	3.31	3.90	3.66	3.80	93.5	113.5	106.6	110.6
India	37.7	36.8	36.7	0.92	0.90	0.86	0.86	34.6	33.3	31.5	31.5
Indonesia	2.7	2.9	2.9	1.85	1.82	1.79	1.79	5.0	5.2	5.2	5.2
Nigeria	9.9	9.5	9.9	0.82	0.67	0.84	0.84	8.1	6.3	8.3	8.3
Philippines	3.6	3.9	3.9	1.22	1.32	1.24	1.24	4.4	5.1	4.9	4.9
Turkey	4.4	4.5	4.5	1.70	1.99	2.17	2.17	7.5	8.9	9.7	9.7
Others	61.9	61.3	61.1	1.14	1.09	1.14	1.14	70.3	67.0	69.8	69.8
<b>BARLEY</b>											
World	74.9	75.1	77.4	2.27	2.48	2.20	2.20	170.1	186.3	170.9	170.1
United States	3.4	3.0	3.4	2.62	3.02	2.97	2.97	8.8	9.2	10.1	10.1
Total Foreign	71.5	72.1	74.0	2.26	2.46	2.17	2.16	161.3	177.1	160.7	160.0
Australia	2.3	2.5	2.8	1.75	1.62	1.39	1.31	4.0	4.1	3.9	3.7
Canada	4.7	4.7	4.5	2.50	2.96	2.79	2.78	11.7	13.9	13.0	12.5
China	3.3	3.3	3.3	1.74	1.73	1.73	1.73	5.7	5.7	5.7	5.7
Eastern Europe	3.6	3.6	3.8	4.03	4.00	3.84	3.74	14.5	14.3	14.5	14.3
EC-12	12.6	12.3	12.1	4.05	4.12	4.20	4.21	51.0	50.8	50.9	51.0
Other W. Europe	1.5	1.5	1.5	3.87	4.37	3.90	3.99	5.9	6.4	6.0	6.1
Turkey	3.4	3.4	3.4	1.46	1.76	2.00	2.00	4.9	6.0	6.8	6.8
USSR	27.6	26.1	28.5	1.75	2.34	1.51	1.51	48.5	61.0	43.0	43.0
Others	12.6	14.7	14.0	1.20	1.01	1.21	1.21	15.1	14.8	17.0	17.0

FOOTNOTES AT END OF TABLE

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TABLE 4  
Coarse Grains Area, Yield, and Production  
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1991/92 1990/91	Proj. Nov.	Proj. Dec.	Prel. 1989/90	1991/92 1990/91	Proj. Nov.	Proj. Dec.
<b><u>CORN</u></b>	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	126.5	127.3	131.2	3.66	3.76	3.67	3.68	462.5	479.2	478.4	483.1
United States	26.2	27.1	27.8	7.30	7.44	6.84	6.84	191.2	201.5	190.2	190.2
Total Foreign	100.3	100.2	103.4	2.70	2.77	2.81	2.83	271.3	277.7	288.2	293.0
Maj. Foreign Exporters	6.6	6.3	6.8	2.77	3.14	2.79	2.79	18.2	19.8	18.9	18.9
Argentina	1.7	2.0	2.2	3.06	4.00	3.27	3.27	5.2	7.8	7.2	7.2
South Africa	3.5	3.0	3.3	2.56	2.73	2.46	2.46	8.9	8.2	8.0	8.0
Thailand	1.4	1.4	1.3	2.93	2.81	2.80	2.80	4.1	3.8	3.7	3.7
Major Importers	21.2	19.7	22.2	3.93	3.50	3.94	3.82	83.4	68.9	84.8	84.8
Eastern Europe	7.1	6.5	6.8	4.14	3.26	4.69	4.55	29.2	21.1	30.9	30.9
EC-12	3.9	3.4	3.9	6.91	6.27	6.71	6.71	26.9	21.6	26.1	26.1
Other W. Europe	0.2	0.2	0.2	7.83	7.98	8.34	8.34	1.8	1.8	1.8	1.8
Mexico	5.8	6.6	7.7	1.68	2.14	2.01	1.88	9.8	14.1	14.5	14.5
USSR	4.1	2.8	3.5	3.71	3.50	3.14	3.14	15.3	9.8	11.0	11.0
Other Maj. Import. 2/	0.1	0.1	0.1	4.28	4.10	4.18	4.18	0.5	0.5	0.5	0.5
Other Foreign	72.5	74.2	74.4	2.34	2.55	2.48	2.54	169.8	189.0	184.5	189.2
Brazil	12.1	13.0	13.0	1.80	1.81	2.00	2.00	21.8	23.5	26.0	26.0
Canada	1.0	1.0	1.1	6.36	6.91	6.06	6.75	6.4	7.2	6.6	7.3
China	20.4	21.4	21.5	3.88	4.52	4.23	4.41	78.9	96.8	91.0	95.0
Egypt	0.8	0.8	0.9	5.37	5.43	5.59	5.59	4.5	4.6	4.8	4.8
India	5.9	6.1	5.7	1.61	1.54	1.47	1.47	9.4	9.4	8.4	8.4
Indonesia	2.7	2.9	2.9	1.85	1.82	1.79	1.79	5.0	5.2	5.2	5.2
Philippines	3.6	3.9	3.9	1.22	1.32	1.24	1.24	4.4	5.1	4.9	4.9
Zimbabwe	1.2	1.1	1.2	1.72	1.45	1.67	1.67	2.0	1.6	2.0	2.0
Others	24.9	24.1	24.2	1.50	1.48	1.47	1.47	37.3	35.6	35.7	35.7
<b><u>SORGHUM</u></b>											
World	41.7	39.2	39.7	1.32	1.35	1.33	1.32	55.0	53.1	53.0	52.4
United States	4.5	3.7	3.9	3.48	3.95	3.73	3.73	15.6	14.5	14.7	14.7
Total Foreign	37.2	35.6	35.8	1.06	1.08	1.06	1.05	39.4	38.6	38.3	37.7
Argentina	0.7	0.7	0.8	2.86	3.57	2.95	2.95	2.0	2.5	2.3	2.3
Australia	0.4	0.4	0.6	2.49	2.22	1.75	1.71	0.9	0.9	1.0	1.0
China	1.6	1.5	1.5	2.72	3.71	3.47	3.47	4.4	5.7	5.2	5.2
India	14.9	14.8	15.0	0.86	0.82	0.80	0.80	12.9	12.1	12.0	12.0
Mexico	1.3	1.3	0.9	2.88	2.85	2.73	2.78	3.8	3.7	3.0	2.5
Nigeria	4.4	4.4	4.4	0.80	0.64	0.80	0.80	3.5	2.8	3.5	3.5
South Africa	0.2	0.2	0.2	1.11	1.12	1.11	1.11	0.3	0.2	0.3	0.3
Sudan	4.0	3.0	3.0	0.45	0.50	0.50	0.50	1.8	1.5	1.5	1.5
Thailand	0.2	0.2	0.2	1.44	1.39	1.47	1.47	0.2	0.3	0.3	0.3
Others	9.4	9.1	9.3	1.02	0.98	1.00	1.00	9.6	8.9	9.3	9.3

FOOTNOTES AT END OF TABLE

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TABLE 4  
Coarse Grains Area, Yield, and Production  
World and Selected Countries and Regions -- Continued

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1990/91	1991/92 Proj. Nov.	Dec.	Prel. 1989/90	1990/91	1991/92 Proj. Nov.	Dec.
<b>OATS</b>	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	22.6	21.3	20.4	1.84	1.98	1.71	1.68	41.4	42.2	35.1	34.3
United States	2.8	2.4	1.9	1.95	2.16	1.81	1.81	5.4	5.2	3.5	3.5
Total Foreign	19.8	18.9	18.4	1.82	1.96	1.70	1.67	36.0	37.0	31.6	30.8
USSR	10.8	10.7	10.7	1.57	1.68	1.36	1.36	16.8	18.0	14.5	14.5
Maj. Foreign Exporters	3.6	2.9	2.9	2.00	2.16	2.00	1.81	7.3	6.4	6.0	5.3
Argentina	0.4	0.3	0.4	1.44	1.34	1.29	1.29	0.6	0.4	0.5	0.5
Australia	1.1	1.1	1.3	1.51	1.43	1.38	1.14	1.6	1.5	1.8	1.5
Canada	1.7	1.2	0.9	2.08	2.34	2.32	2.14	3.5	2.9	2.3	1.9
Sweden	0.4	0.4	0.3	3.54	4.42	4.09	4.09	1.5	1.6	1.4	1.4
Other Foreign	5.4	5.3	4.8	2.21	2.40	2.28	2.28	11.9	12.6	11.1	11.0
China	0.6	0.6	0.6	1.20	1.21	1.18	1.18	0.7	0.7	0.7	0.7
Eastern Europe	1.2	1.2	1.2	2.55	2.70	2.55	2.54	3.2	3.3	3.0	3.0
Czechoslovakia	0.1	0.1	0.1	3.24	4.55	4.00	4.00	0.3	0.4	0.4	0.4
Poland	0.8	0.7	0.7	2.72	2.84	2.67	2.65	2.2	2.1	1.9	1.9
EC-12	1.8	1.6	1.4	2.74	3.07	3.06	3.09	4.8	5.1	4.4	4.4
France	0.3	0.2	0.2	3.73	3.86	3.81	3.81	1.0	0.9	0.8	0.8
Germany	0.6	0.6	0.4	3.58	3.93	4.92	4.92	2.0	2.4	1.9	1.9
Finland	0.4	0.5	0.3	3.24	3.67	3.23	3.23	1.4	1.7	1.1	1.1
Norway	0.1	0.1	0.1	3.13	4.38	4.00	3.97	0.4	0.6	0.5	0.5
Others	1.3	1.3	1.2	1.11	1.09	1.16	1.16	1.4	1.4	1.4	1.4
<b>RYE</b>											
World	16.9	16.6	13.9	2.22	2.33	2.09	2.09	37.6	38.7	29.1	29.1
United States	0.2	0.2	0.2	1.77	1.70	1.55	1.55	0.3	0.3	0.2	0.2
Total Foreign	16.7	16.4	13.7	2.23	2.34	2.10	2.10	37.2	38.5	28.9	28.8
USSR	10.7	10.4	8.5	1.87	2.02	1.59	1.59	20.1	21.0	13.5	13.5
Maj. Foreign Exporter											
Canada	0.5	0.4	0.2	1.74	1.70	1.78	1.86	0.9	0.7	0.4	0.4
Other Foreign											
Eastern Europe	3.3	3.4	3.4	2.94	2.88	2.82	2.82	9.7	9.9	9.5	9.5
Hungary	0.1	0.1	0.1	2.06	2.46	2.40	2.40	0.2	0.2	0.2	0.2
Poland	2.9	3.1	3.0	2.95	2.86	2.82	2.82	8.6	8.8	8.5	8.5
Czechoslovakia	0.2	0.2	0.2	4.05	4.26	3.82	3.82	0.7	0.7	0.7	0.7
EC-12	1.6	1.6	1.2	3.32	3.40	3.65	3.66	5.2	5.4	4.5	4.5
Denmark	0.1	0.1	0.1	4.82	4.95	4.57	4.57	0.5	0.5	0.4	0.4
Germany	1.0	1.0	0.7	3.86	3.87	4.66	4.66	3.9	4.0	3.3	3.3
Others	0.6	0.6	0.5	2.29	2.38	2.20	2.21	1.3	1.5	1.0	1.0

1/ Total of barley, corn, sorghum, oats, and rye shown below, plus millet and mixed grain.

2/ Japan, Republic of Korea, and Taiwan.

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TABLE 5

# Rice Area, Yield, and Production World and Selected Countries and Regions

	AREA			YIELD			PRODUCTION (Rough Basis)			MILLING RATE			PRODUCTION (Milled Basis)		
	Prel.	Proj.	1989/90 1990/91	Prel.	1991/92 Proj.	1989/90 1990/91	Prel.	1991/92 Proj.	1989/90 1990/91	Prel.	1991/92 Proj.	1989/90 1990/91	Prel.	1991/92 Proj.	
	1989/90	1990/91		1991/92	Nov.		Dec.	Nov.		Dec.	Nov.		Dec.	Nov.	Dec.
	——Million Hectares——			——Metric Tons Per Hectare——			——Million Metric Tons——			——In Percent——			——Million Metric Tons——		
World	146.4	147.1	145.9												
United States	1.1	1.1	1.1												
Total Foreign	145.3	145.9	144.7												
Maj. Foreign Exporters	16.8	16.6	16.6												
Burma	4.7	4.8	4.5												
Pakistan	2.1	2.1	2.1												
Thailand	10.0	9.7	10.0												
Major Importers	13.9	13.9	13.5												
EC-12	0.3	0.4	0.4												
Indonesia	10.5	10.5	10.1												
Nigeria	0.6	0.7	0.7												
Republic of Korea	1.3	1.2	1.2												
Other Maj. Import. 1/	1.2	1.1	1.1												
Other Foreign	114.6	115.4	114.7												
Australia	0.1	0.1	0.1												
Bangladesh	10.5	10.4	10.5												
Brazil	4.3	4.5	5.3												
China	32.7	33.1	32.8												
India	42.2	42.6	41.1												
Japan	2.1	2.1	2.0												
Philippines	3.4	3.4	3.3												
USSR	0.7	0.6	0.6												
Vietnam	5.7	5.7	5.9												
Others	12.9	13.0	12.9												

1/ Hong Kong, Iran, Iraq, Ivory Coast, and Saudi Arabia.

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TABLE 6  
Oilseeds Area, Yield, and Production  
World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel.		Proj.	Prel.		1991/92 Proj.		Prel.		1991/92 Proj.	
	1989/90	1990/91	1991/92	1989/90	1990/91	Nov.	Dec.	1989/90	1990/91	Nov.	Dec.
	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
<u>SOYBEANS</u>											
World	58.25	54.05	55.20	1.84	1.91	1.90	1.90	107.26	103.00	105.28	105.08
United States	24.09	22.87	23.73	2.17	2.29	2.25	2.25	52.35	52.42	53.39	53.39
Total Foreign	34.15	31.18	31.47	1.61	1.62	1.64	1.64	54.91	50.58	51.89	51.69
Maj. Foreign Exporters	16.35	14.40	15.00	1.90	1.83	1.88	1.88	31.09	26.30	28.25	28.25
Argentina	4.95	4.75	5.00	2.17	2.27	2.15	2.15	10.75	10.80	10.75	10.75
Brazil	11.40	9.65	10.00	1.78	1.61	1.75	1.75	20.34	15.50	17.50	17.50
Other Foreign	17.80	16.78	16.47	1.34	1.45	1.42	1.42	23.82	24.28	23.64	23.44
Canada	0.54	0.49	0.58	2.26	2.63	2.14	2.44	1.22	1.29	1.23	1.41
China	8.06	7.56	7.20	1.27	1.46	1.39	1.40	10.23	11.00	10.00	10.10
Eastern Europe	0.70	0.34	0.25	0.97	1.07	1.35	1.35	0.68	0.36	0.33	0.33
EC-12	0.63	0.69	0.54	3.13	3.09	3.11	3.11	1.98	2.14	1.71	1.68
India	2.13	2.39	2.50	0.80	1.02	1.02	0.92	1.72	2.44	2.70	2.30
Indonesia	1.21	1.22	1.24	1.09	1.08	1.04	1.04	1.32	1.32	1.29	1.29
Paraguay	0.98	0.89	0.90	1.61	1.46	1.78	1.78	1.58	1.30	1.60	1.60
USSR	0.83	0.83	0.81	1.15	1.06	1.14	1.14	0.96	0.88	0.92	0.92
Others	2.73	2.37	2.46	1.52	1.50	1.55	1.55	4.15	3.56	3.86	3.81
<u>COTTONSEED</u>											
World	32.27	33.27	34.22	0.96	1.01	1.02	1.01	30.95	33.57	34.90	34.56
United States	3.86	4.75	5.39	1.10	1.14	1.17	1.17	4.24	5.41	6.38	6.30
Total Foreign	28.41	28.53	28.83	0.94	0.99	0.99	0.98	26.71	28.15	28.52	28.26
China	5.20	5.59	6.00	1.24	1.37	1.36	1.36	6.44	7.66	8.16	8.16
India	7.53	7.36	7.27	0.58	0.53	0.59	0.56	4.40	3.90	4.30	4.10
Pakistan	2.60	2.69	2.78	1.12	1.21	1.23	1.25	2.91	3.27	3.40	3.48
USSR	3.33	3.15	3.01	1.53	1.56	1.46	1.46	5.11	4.92	4.40	4.40
Others	9.74	9.74	9.78	0.81	0.86	0.84	0.83	7.85	8.40	8.26	8.12
<u>PEANUTS</u>											
World	19.81	20.01	20.20	1.11	1.14	1.16	1.15	22.05	22.88	23.51	23.29
United States	0.67	0.73	0.80	2.72	2.23	2.82	2.82	1.81	1.63	2.24	2.24
Total Foreign	19.15	19.28	19.41	1.06	1.10	1.10	1.08	20.24	21.25	21.27	21.05
Argentina	0.18	0.20	0.19	1.87	2.37	2.11	2.11	0.34	0.48	0.40	0.40
China	2.96	2.91	2.92	1.81	2.19	2.09	2.09	5.37	6.37	6.10	6.10
India	8.71	8.65	8.70	0.93	0.93	0.94	0.92	8.09	8.08	8.20	8.00
Senegal	0.78	0.92	0.90	1.04	0.73	0.77	0.77	0.82	0.67	0.70	0.70
South Africa	0.09	0.09	0.09	1.28	1.59	1.50	1.50	0.11	0.14	0.14	0.14
Sudan	0.55	0.54	0.53	0.73	0.60	0.75	0.75	0.40	0.33	0.40	0.40
Others	5.88	5.98	6.08	0.87	0.87	0.88	0.88	5.12	5.19	5.34	5.32



**TABLE 6**  
**Oilseeds Area, Yield, and Production**  
**World and Selected Countries and Regions -- Continued**

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	1991/92	Prel. 1989/90	1990/91	1991/92 Proj. Nov. Dec.		Prel. 1989/90	1990/91	1991/92 Proj. Nov. Dec.	
<b><u>SUNFLOWERSEED</u></b>	---Million Hectares---			---Metric Tons Per Hectare---				---Million Metric Tons---			
World	15.87	16.29	16.46	1.38	1.38	1.30	1.31	21.85	22.53	21.36	21.55
United States	0.72	0.75	1.02	1.10	1.38	1.46	1.46	0.80	1.03	1.50	1.50
Total Foreign	15.15	15.54	15.44	1.39	1.38	1.29	1.30	21.06	21.50	19.86	20.05
Argentina	2.80	2.30	2.50	1.36	1.70	1.40	1.40	3.80	3.90	3.50	3.50
China	0.72	0.71	0.71	1.49	1.88	1.62	1.76	1.06	1.34	1.15	1.25
EC-12	2.13	2.58	2.41	1.67	1.64	1.67	1.69	3.54	4.23	3.99	4.06
East Europe	1.27	1.23	1.24	1.81	1.70	1.78	1.71	2.29	2.09	2.15	2.13
USSR	4.46	4.67	4.60	1.59	1.41	1.30	1.30	7.07	6.56	6.00	6.00
Others	3.78	4.06	3.98	0.87	0.83	0.77	0.78	3.30	3.38	3.07	3.11
<b><u>RAPSEED</u></b>											
World	17.12	18.24	20.00	1.28	1.39	1.37	1.39	21.86	25.37	27.22	27.82
United States 1/	0.03	0.03	0.06	1.58	1.74	1.75	1.75	0.05	0.05	0.11	0.11
Total Foreign	17.09	18.21	19.94	1.28	1.39	1.36	1.39	21.80	25.32	27.12	27.71
Canada	2.90	2.58	3.27	1.07	1.27	1.28	1.32	3.10	3.28	4.20	4.30
China	4.99	5.50	6.10	1.09	1.26	1.16	1.16	5.44	6.96	7.10	7.10
EC-12	1.81	2.13	2.42	2.96	2.89	3.00	3.05	5.34	6.14	7.29	7.39
East Europe	0.81	0.74	0.69	2.66	2.38	2.41	2.41	2.15	1.75	1.66	1.66
India	4.99	5.72	5.80	0.83	0.94	0.88	0.93	4.12	5.40	5.00	5.40
Others	1.59	1.54	1.66	1.04	1.16	1.09	1.12	1.66	1.78	1.87	1.86
<b><u>FLAXSEED</u></b>											
World	3.74	3.76	3.37	0.50	0.61	0.60	0.60	1.85	2.30	2.02	2.01
United States	0.07	0.10	0.12	0.47	0.95	0.97	0.97	0.03	0.10	0.11	0.11
Total Foreign	3.67	3.66	3.25	0.50	0.60	0.58	0.58	1.82	2.20	1.90	1.89
Argentina	0.58	0.58	0.42	0.90	0.83	0.86	0.86	0.52	0.48	0.36	0.36
Canada	0.60	0.73	0.53	0.83	1.29	1.30	1.30	0.50	0.94	0.70	0.69
India	1.18	1.17	1.10	0.29	0.31	0.32	0.32	0.34	0.36	0.35	0.35
USSR	0.97	0.85	0.85	0.24	0.19	0.21	0.21	0.23	0.16	0.18	0.18
Others	0.36	0.34	0.35	0.67	0.77	0.89	0.89	0.24	0.26	0.31	0.31
<b><u>MAJOR OILSEEDS</u></b>	147.07	145.62	149.45	1.40	1.44	1.43	1.43	205.82	209.64	214.29	214.31
United States	29.44	29.23	31.12	2.01	2.07	2.04	2.05	59.29	60.65	63.73	63.65
Total Foreign	117.63	116.39	118.33	1.25	1.28	1.27	1.27	146.53	148.99	150.56	150.66
<b><u>COPRA</u></b>	--	--	--	--	--	--	--	4.90	4.69	4.57	4.57
<b><u>PALM KERNEL</u></b>	--	--	--	--	--	--	--	3.33	3.28	3.59	3.59
<b><u>TOTAL OILSEEDS</u></b>	--	--	--	--	--	--	--	214.05	217.61	222.45	222.47
<b><u>PALM OIL 2/</u></b>	--	--	--	--	--	--	--	10.91	11.08	11.91	11.91

1/ U.S. rapeseed estimates by the WAOB and Interagency Oilseeds Committee. 2/ Not included in total oilseeds.



TABLE 7

## Cotton Area, Yield, and Production World and Selected Countries and Regions

COUNTRY/REGION	AREA			YIELD				PRODUCTION			
	Prel. 1989/90	Proj. 1990/91	Proj. 1991/92	Prel. 1989/90	1991/92 1990/91	Proj. Nov.	Proj. Dec.	Prel. 1989/90	1991/92 1990/91	Proj. Nov.	Proj. Dec.
	---Million Hectares---			---Kilograms Per Hectare---				---Million 480-Pound Bales---			
World	31.6	33.0	34.1	552	574	583	579	80.0	87.1	91.6	90.5
United States	3.9	4.7	5.4	688	711	727	727	12.2	15.5	18.2	18.0
Total Foreign	27.7	28.3	28.7	533	551	556	551	67.8	71.6	73.4	72.5
Maj. Foreign Exporters	13.1	13.2	13.5	727	791	776	775	43.7	48.1	48.3	48.2
Australia	0.2	0.3	0.3	1,271	1,604	1,532	1,340	1.4	2.0	1.9	1.7
Central America 1/	0.1	0.1	0.1	832	810	742	742	0.3	0.3	0.3	0.3
China	5.2	5.6	6.0	728	807	798	798	17.4	20.7	22.0	22.0
Egypt	0.4	0.4	0.4	683	719	811	811	1.3	1.4	1.3	1.3
Mexico	0.2	0.2	0.3	891	914	737	704	0.8	0.8	0.9	0.8
Pakistan	2.6	2.7	2.8	560	607	612	628	6.7	7.5	7.8	8.0
Sudan	0.3	0.2	0.2	456	422	494	494	0.6	0.4	0.4	0.4
Turkey	0.7	0.6	0.6	851	1,021	956	956	2.8	3.0	2.7	2.7
USSR	3.3	3.2	3.0	805	827	796	796	12.3	12.0	11.0	11.0
Major Importers 2/	0.4	0.4	0.3	887	803	861	855	1.5	1.5	1.4	1.4
Other Foreign	14.3	14.6	14.8	346	327	348	338	22.6	22.0	23.7	23.0
Argentina	0.6	0.6	0.7	486	468	501	486	1.3	1.4	1.5	1.5
Brazil	1.9	2.0	2.0	347	352	381	376	3.0	3.2	3.5	3.5
India	7.3	7.4	7.3	315	270	298	283	10.6	9.1	10.0	9.5
Syria	0.2	0.2	0.2	930	963	934	934	0.7	0.7	0.7	0.7
Others	4.3	4.5	4.7	357	367	370	368	7.0	7.6	8.1	7.9

1/ Nicaragua, Guatemala, El Salvador, Honduras, and Costa Rica.

2/ Western Europe, Eastern Europe, Japan, Hong Kong, Republic of Korea, and Taiwan.

December 1991

Production Estimates and Crop Assessment Division, FAS, USDA



TABLE 8

The table below presents a 10-year record of the difference between the December projections and the final estimates. Using world wheat production as an example, changes between the December projection and the final estimate have averaged 4.7 million tons (0.9 percent) and ranged from -10.2 to 6.1 million tons. The December projection has been below the final 6 times and above the final 4 times.

## RELIABILITY OF PRODUCTION PROJECTIONS

COMMODITY AND REGION	PROJECTION AND FINAL ESTIMATES, 1981/82 – 1990/91 1/					
	Difference		Lowest	Highest	Below Final	Above Final
	Average	Average	Difference			
	Percent	--- <i>Million Metric Tons</i> ---			Number of Years 2/	
<i>WHEAT</i>						
World	0.9	4.7	-10.2	6.1	6	4
U.S.	0.5	0.3	-1.2	0.2	6	4
Foreign	1.1	4.7	-10.3	6.3	6	4
<i>COARSE GRAINS 3/</i>						
World	1.0	7.6	-19.8	6.9	5	5
U.S.	1.3	2.7	-7.5	2.1	8	2
Foreign	1.1	6.5	-15.4	7.6	4	6
<i>RICE (Milled)</i>						
World	2.2	6.7	-16.2	1.1	8	2
U.S.	2.6	0.1	-0.2	0.2	6	2
Foreign	2.2	6.7	-16.2	1.2	8	2
<i>SOYBEANS</i>						
World	2.3	2.1	-4.4	3.8	4	6
U.S.	2.6	1.4	-2.7	2.1	3	7
Foreign	3.9	1.6	-2.1	2.7	4	6
			--- <i>Million 480-lb. Bales</i> ---			
<i>COTTON</i>						
World	1.9	1.6	-6.3	2.2	3	6
U.S.	1.7	0.2	-0.5	0.4	5	4
Foreign	2.2	1.5	-6.7	1.8	3	6
UNITED STATES			----- <i>Million Bushels</i> -----			
<i>CORN</i>	1.4	93	-250	94	7	3
<i>SORGHUM</i>	2.4	19	-53	14	6	4
<i>BARLEY</i>	1.8	9	-12	24	6	4
<i>OATS</i>	1.3	6	-18	16	6	2

1/ The final estimate for 1981/82-1989/90 is defined as the first November estimate following the marketing year and for 1990/91 last month's estimate.

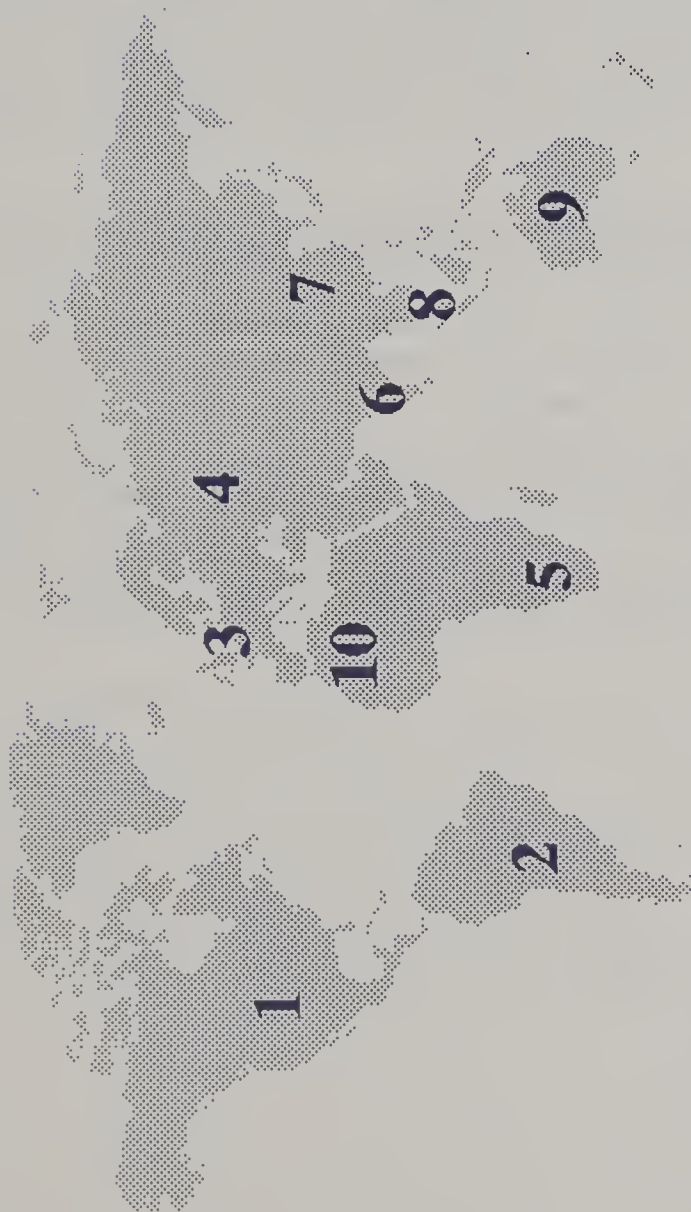
2/ May not total ten if projection was the same as the final.

3/ Includes corn, sorghum, barley, oats, rye, millet, and mixed grain.



# WORLD AGRICULTURAL WEATHER HIGHLIGHTS

DECEMBER 11, 1991



## 1 - UNITED STATES

Record November snowfall covers Iowa and Minnesota, with unseasonably cold weather from the Rockies to the Appalachians. Snow precedes bitter cold air in the central Plains. Pacific storms bring some beneficial rain to California in early December, with milder weather and some record high temperatures returning to the Midwest and Southeast.

## 2 - SOUTH AMERICA

In Argentina, persistent wet weather has raised concerns about winter wheat quality and lodging. However, soil moisture is favorable for summer crops. Generally favorable rains fall across southern Brazil during November, aiding corn and soybeans.

## 3 - EUROPE

November rainfall favors winter grains entering dormancy, with spotty dryness in Germany, Romania and Spain. Recent moisture across the Mediterranean region benefits winter crops.

## 4 - WESTERN USSR

Mild November weather favors dormant winter grains. Recent bitter cold accompanies widespread snow.

## 5 - SOUTH AFRICA

A drying trend during November aids corn planting. December showers boost topsoil moisture in western corn areas that were becoming too dry.

## 6 - SOUTH ASIA

Showers in southern India boost irrigation for fall crops but cause some flooding in coastal rice areas.

## 7 - EASTERN ASIA

Continued dry weather is stressing winter wheat germination and causing poor establishment. While significant winter rains are unlikely, timely spring rains can still improve conditions. Southern China received needed rain to replenish reservoirs for next season's crops.

## 8 - SOUTHEAST ASIA

Beneficial showers reach Java's drought-stricken rice areas, improving planting prospects. Widespread showers in the Philippines help fall grain establishment.

## 9 - AUSTRALIA

Favorable harvest conditions exist for winter wheat throughout the country. Periodic showers during November have increased soil moisture levels for eastern summer crops.

## 10 - NORTHWESTERN AFRICA

Below-normal November precipitation in Morocco and western Algeria helps wheat planting but limits early growth. Beneficial rain covers eastern Algeria and Tunisia.

(More details are available in the *Weekly Weather and Crop Bulletin*.  
Subscription information may be obtained by calling (202) 720-7917.)



## WEATHER BRIEFS

### NORTHWEST AFRICA: BECOMING TOO DRY IN MOROCCO

Unseasonably frequent and sometimes heavy rains fell across northwestern Africa's wheat growing areas during September and October 1991, boosting soil moisture levels and allowing an early winter grains planting around mid-October. Usually, winter grains are planted from November into December. Precipitation in Morocco was below normal during November 1991, causing some depletion of soil moisture and the need for subsequent rainfall for continued winter grain emergence and growth. Light rains during November 24 - December 7, 1991, dampened topsoils and provided some relief. Elsewhere, rainfall during November 1 - December 7, 1991 was frequent, but slightly below normal across Algeria and generally above normal across Tunisia. Soil moisture levels are similar to last year and, thus, sufficient for another good start for the winter grain crops in these two countries.

### EASTERN MEDITERRANEAN: HEAVY RAINFALL EASES DROUGHT

Precipitation during the first 10 days of December 1991 was unseasonably widespread and heavy across the eastern Mediterranean countries. An unusual series of winter storms brought heavy precipitation to an area extending from northeast Africa in the south, across Greece and the Balkans in the northwest, to Iran in the east. Rainfall greatly improved soil moisture for winter grains across the Middle East and Turkey. Also, in Greece and Cyprus, run-off greatly increased reservoir levels, which were low due to multi-year droughts. Snowfall has been very heavy in the higher elevations and more northern areas, including Bulgaria, Romania, and Turkey. Flooding was widespread and caused damage to infrastructure in portions of Israel, Jordan, Turkey, and Iran.

### SOUTH AFRICA: SOMEWHAT DRIER, BUT CONDITIONS STILL GOOD

Rainfall was slightly below normal across the Maize Triangle of South Africa during November 1991. However, conditions for summer crops remained favorable and much better than last year, due to adequate soil moisture caused by the above normal early season rainfall during October and early November 1991. Temperatures were above normal during November 24-30, 1991, increasing the need for moisture. However, rainfall returned during December 1-11, 1991. Rainfall continued to be frequent, but not excessive, across the eastern Cape Province and Natal. This benefited summer crops and sugarcane.



## PRODUCTION BRIEFS

### BRAZIL: 1992/93 COFFEE FORECAST DOWN SHARPLY

Brazil's 1992/93 coffee production is forecast at 22.0 million bags (60-kilogram), down 23 percent or 6.5 million bags from the revised 1991/92 outturn, according to the U.S. agricultural counselor in Brasilia. This initial forecast for the 1992/93 season is based on field travel by the office of the agricultural counselor in Brazil's major coffee producing areas during late October. Coffee producing areas were visited in the states of Parana, Sao Paulo, and Minas Gerais.

Most of the coffee trees in Parana and Sao Paulo were in their "off-year" production cycle during the 1991/92 season and neither state was able to produce more than 40 percent of its potential. With little credit and low grower incomes from the previous season, coffee growers were limited in the amount of inputs they could provide for the 1992/93 crop. Dry weather in July, August, and September 1991 left coffee trees in these 2 states in poor vegetative condition. Trees often had less than 20 percent of normal leaf coverage, with about three-fourths of the limbs dry at the time of the visit. The first significant bloom of trees in Parana and Sao Paulo occurred during early October. The trees had severe losses of newly-set coffee cherries because of dry weather and poor tree conditions. In both states, a significant number of coffee trees were uprooted to clear land for citrus, pasture, or sugarcane. Many trees were cut back to ground level or heavily pruned in an effort to boost vegetative vigor.

In the state of Minas Gerais (central, west, and southwest), the majority of trees were in their "on-year" production cycle during the 1991/92 season. The July/September weather was not as dry in this area as it was in the other two states. Low soil fertility and less-than-optimal plantation management are blamed for the current poor vegetative growth shown by the trees. Coffee plantations are located further north and at higher elevations than in Parana and Sao Paulo, causing coffee trees to bloom later in the season. Application of fertilizers and fungicides during the months of October and November are expected to produce beneficial results in terms of vegetative conditions of the coffee trees and improve yields.

In the state of Espirito Santo, coffee areas reportedly have had an adequate amount of rainfall during the past six months. The production potential for this state is near optimum.

### TAIWAN: TRADE WITH CHINA COULD STIMULATE RICE PRODUCTION

Taiwan's rice production could be revitalized if the Government permits grain trade with China, according to the Taiwan Provincial Food Bureau. The Mainland Affairs Council recently decided to study the possibility of grain exchanges with China as part of the Government's efforts to improve relations. Taiwan's rice farmers are troubled by large stocks, declining domestic consumption, and difficulties in opening overseas markets. Taiwan could increase rice production by permitting planting on about 180,000 hectares of paddy fields taken out of production under a rice area diversion plan.



#### NORWAY: NEW POLICIES CHANGE GRAIN CORPORATION AND SUPPORT PRICES

Effective January 1, 1992, the Norwegian Grain Corporation will cease to be part of the Ministry of Agriculture and will become a separate state-owned company, the U.S. agricultural attache in Copenhagen reported. Other policy changes include a Government decision to reduce prices paid to farmers by 12 to 15 percent (depending on the grain), and redirect some support to individual farmers on an area basis, rather than price basis. This is the first time price supports were reduced in order to shift overall domestic support policies in the direction of area-based supports. The portion of the farmer's income originating from direct payments (based on area) rose appreciably and will have the effect of penalizing the larger, more efficient producers in favor of a social policy of keeping medium and small producers on the land. These policy changes have been motivated by the need to adjust agricultural support prices gradually in order to comply with General Agreement on Tariffs and Trade (GATT) standards expected from the current round of multilateral trade negotiations.

#### INDONESIA: RICE LAND OFFERED TO BUSINESS CONGLOMERATES

In an effort to expand rice production and enhance Indonesia's ability to remain self-sufficient in rice, the Government has offered business conglomerates land in North Sulawesi, South Sulawesi, Aceh, North Sumatra, and Lampung for rice production. These areas are comparatively less developed for rice production than Java and will require considerable investment, the U.S. agricultural attache in Jakarta reported. The expansion will be based on profit-sharing between these organizations and small-scale farmers. Planting for the 1992/93 rice season has started.

#### CANADA: STATISTICS CANADA ESTIMATES BUMPER GRAIN CROP

Total 1991/92 production of the 8 major grains in Canada is estimated at 61.2 million tons, down 3 percent from last year's record, according to Statistics Canada. Most of western Canada began the season with above normal precipitation that replenished soil moisture. These conditions promoted excellent crop growth, but plants developed shallow root systems. In low-lying areas, the excessive moisture resulted in a greater-than-normal incidence of disease, notably Sclerotinia and blackleg. Because of poor root development, hot, dry weather in many regions after mid-July stressed crops during the crucial grain-filling stage and reduced yields, especially for oats and barley. In eastern Canada, weather early in the season was hot and dry with precipitation below normal until mid-July. Yields varied widely in eastern Canada from good to poor, depending on the distribution and quantity of rainfall; however, corn and soybean yields were generally above expectations.

Wheat production is estimated at a record 32.8 million tons, marginally above last year's crop. Although winter wheat output fell by 0.7 million tons from 1990/91, additional spring wheat area more than compensated for the decline. Spring wheat production in Saskatchewan and Alberta increased, while output was lower in Manitoba. Total production of barley, corn, oats, rye, and mixed grains is estimated at 22.7 million tons, down 11 percent from 1990/91. Barley output fell 10 percent from last year to 12.5 million tons, mainly due to poorer yields resulting from dryness in Manitoba and Saskatchewan. Corn production rose to a record 7.3 million tons, 2 percent above last year as a result of increased area in Ontario. Higher yields in western Ontario offset lower yields in southern and eastern Ontario caused by dry conditions.



Total oilseed production reached a record 6.4 million tons, up 16 percent from 1990/91 and slightly above the previous record set in 1988/89. Rapeseed output is estimated at 4.3 million tons, up 31 percent from last season and marginally below the 1988/89 record crop. The major rapeseed producing provinces (Manitoba, Saskatchewan, and Alberta) increased area and yield from 1990/91. Soybean production climbed 9 percent from last year to a record 1.4 million tons. An increase in yield and a record harvested area boosted soybean output.

#### SOUTH AFRICA: CORN PLANTING OUTLOOK

Favorable rains in October and the first half of November encouraged farmers to plant more than a million hectares of corn, as of November 15, according to the U.S. agricultural attache in Pretoria. Rainfall diminished and temperatures increased to higher-than-normal levels during late November; however, recent rains should allow producers to successfully complete planting. Last year, farmers successfully harvested corn planted through late January. The USDA December estimate of corn harvested area stands at 3.25 million hectares.

#### CHILE: COLD WEATHER DAMAGES FRUITS AND VEGETABLES

According to the U.S. agricultural attache in Santiago, cold weather and snow in mid-October damaged approximately 16,000 hectares planted to fruit orchards, 6,500 hectares planted to vegetables, and 7,500 hectares of wine-grape vineyards. Orchard area damaged by type of fruit is as follows:

<u>Fruit</u>	<u>Affected Area</u> (Hectares)	<u>Percent of Total Fruit Area</u>
Table Grapes	6,500	14
Kiwifruit	3,500	28
Peaches/Nectarines	1,500	10
Plums	1,200	14
Pears	1,100	7
Apples	900	4
Asian Pears	300	20
Cherries	100	4

Additional information will be released as it becomes available.



## FEATURE COMMODITY ARTICLES

### SOUTH AMERICAN SOYBEAN PRODUCTION

South America is forecast to produce a 30.6 million ton 1991/92 soybean crop, up 8 percent from last year and up 72 percent since 1981/82. In spite of record production in Argentina and Bolivia, the 1990/91 soybean crop was the lowest since 1986/87 due to lower area and yields in Brazil and Paraguay. South American soybean production is second only to the United States and, in 1991/92, is forecast to account for 29 percent of the total world production.

#### BRAZIL

Brazil is the largest soybean producer in South America and is projected to harvest 17.5 million tons in 1991/92, up 13 percent from last year's drought-reduced crop. Area is forecast to make a minimal 3-percent recovery and yield is projected to return to a near average level. Soybean production fell to 15.5 million tons in 1990/91 from 20.3 million tons in 1989/90 due to a 15-percent loss in area and low yields in Brazil's southern growing areas. Brazil is the world's second largest producer and exporter of soybeans (behind the United States), the largest exporter of soybean meal, and the third largest exporter of soybean oil (behind the EC and Argentina).

Total area for 1991/92 is currently forecast at 10.0 million hectares. The Center-West area is expected to recover from last year's low level as farmers respond favorably to the Government's recent attempts to stimulate production in this region. Farmers in the south are not expected to increase soybean plantings over last year's low level; however, earlier expectations for large-scale diversions of soybean area to corn are not forecast to materialize. Despite pre-season dryness and topsoil moisture deficits in the primary growing areas, rainfall during the last week of September and the first week of October 1991 provided satisfactory conditions for planting and early crop establishment in most areas. Topsoil moisture is considered adequate in the Center-West. However, southern Mato Grosso do Sul, Parana, and Sao Paulo are experiencing shortages. Additional rainfall during December will be beneficial for crop establishment in all areas.

Brazilian soybean production has increased 40 percent in the last 10 years and nearly 500 percent since 1971. Recent increases are due largely to an expansion of area under cultivation in the Center-West growing region, which includes Mato Grosso, Mato Grosso do Sul, and Goias. Roughly 25 percent of the soybean crop is grown in the Center-West. The traditional growing region in the south, which consists of the states of Rio Grande do Sul, Parana, Santa Catarina, and Sao Paulo, is responsible for roughly 50 percent of Brazil's total production. Planting may begin as early as September and continue through January; however, the bulk of the soybean crop is planted from mid-October through December.

#### ARGENTINA

Argentina is South America's second largest soybean producer and the fourth largest producer in the world. Soybean production for 1991/92 is forecast at 10.7 million tons, down slightly from the record 10.8 million produced in 1990/91, despite an increase in harvested area of 5 percent from 1990/91. Argentina is one of the largest producers and exporters of oilseeds and oilseed products and will continue to be an important player in world soybean markets, both for soybeans and soybean products.

Soybean planting in Argentina begins in November and continues through January. Area for 1991 is forecast at a record 5.0 million hectares. Current growing conditions favor early planting due to adequate soil moisture. An estimated 92-percent of Argentine soybeans are produced in three provinces: Santa Fe, Buenos Aires, and Cordoba. Double-cropping soybeans after wheat is limited to the rich soil regions of northern Buenos Aires and southern Santa Fe and is expected to decrease from the estimated 35-percent of soybean area in 1990/91.

The large decrease in wheat area this year allows ample room for 1991/92 summer crop expansion. Soybeans, sunflower, and corn have excellent prospects for increased area. However, soybean seed quality might have been affected by last year's delayed harvest. If low quality seed is used to plant the 1991/92 crop, it could have an effect on yield since an estimated 30-50 percent of farmers retain their own seed for planting, despite having high-yielding commercial varieties available.

Improved economic conditions are contributing to renewed optimism among Argentine farmers. Recently, inflation has ranged between 1 and 2 percent for the months of August through October, down significantly from 96 percent in March 1990. This has made farm planning more realistic, especially for credit and input costs. In addition, the strong austral may induce farmers to increase input use as fertilizers and pesticides would be relatively less expensive.

#### PARAGUAY

Paraguay is the third largest soybean producer in South America, producing 5 percent of the South American soybean crop. Paraguay is forecast to produce 1.6 million tons of soybeans during the 1991/92 crop year, up 23 percent from last year's drought-reduced levels. Production has increased in recent years due to expanded area and changes in Paraguay's monetary and export policies to favor agricultural exports. Output has increased 167 percent since 1981/82 and 68 percent over the last five years.

Planted area is forecast at 0.9 million hectares, nearly unchanged from last year, but up 114 percent from 10 years ago. Soil moisture is adequate and planting of the 1991/92 crop is progressing normally. Planting begins in October and continues through December. The harvest season extends from April through June. Soybeans are grown primarily in southern Paraguay (east of the Paraguay River), where the climate, topography, and soil type are similar to the Brazilian soybean growing areas of western Parana and Rio Grande do Sul. Soybean area has more than doubled since 1981/82 and the potential for continued area expansion exists in the fertile, forested areas of southeastern Paraguay.

Paraguayan farmers currently face an unfavorable economic situation, following two consecutive poor harvests. In spite of achieving record planted soybean area in 1989/90, production was limited by hot, dry weather at flowering, which greatly reduced yields. In 1990/91, dry weather reduced yields once again and a shortage of affordable credit at planting led to low input use and planting delays. The 1991/92 outlook is for a minimal increase in planted area. Farmers lack capital and do not expect Government assistance. However, there are no attractive alternatives to soybeans, so diversion of cropping area to other crops is not expected. Preplanting soil moisture was low, but adequate rainfall arrived in time for planting to progress normally. If yields reach normal levels, Paraguayan soybean production should increase significantly over last year.



## BOLIVIA

Bolivia is South America's fourth largest soybean producer, but accounts for only 1 percent of total South American production. Soybean production has been growing rapidly over the last 7 years and is expected to increase in the near future, albeit at a slower pace. Production for 1991/92 is forecast at 430,000 tons, up 10 percent from last year's record of 390,000.

Soybeans are the principle oilseed grown in Bolivia and nearly all soybeans are grown in the Santa Cruz region, east of the Andes. The tropical wet and dry climate allows for two soybean crops. The summer, or main, crop accounts for 80 to 85 percent of production. Planting begins in November/December and harvesting in April/May. The smaller winter soybean crop has a growing season starting in May and June, with harvesting from September through October. Area for 1991 is forecast at 210,000 hectares.

Economic incentives favor continued expansion of soybean production in Bolivia. Soybeans are a non-traditional agricultural product and are aided by international development loans designed to expand exports. Subsidized transportation and a 10-percent rebate for exports of non-traditional products effectively support and encourage soybean production. The availability of suitable land, especially along the Santa Cruz to Corumba railway, also encourages expansion. The limiting factor is working capital.

---

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TABLE 9

# South American Soybean Area, Yield, and Production

	1981	1982	1983	1984	1985	1986	1987	1988	1989	1990	1991 <sup>f</sup>
<b>AREA HARVESTED (1000 hectares)</b>											
Brazil	8,202	8,136	9,421	10,153	9,450	9,270	10,524	12,170	11,400	9,650	10,000
Argentina	1,986	2,281	2,910	3,270	3,316	3,510	4,260	4,000	4,950	4,750	5,000
Paraguay	420	350	420	550	550	530	615	850	980	890	900
Bolivia	49	33	50	63	66	69	83	144	173	195	210
Other 1/	99	90	66	95	133	160	164	212	222	218	198
<b>Total</b>	<b>10,756</b>	<b>10,890</b>	<b>12,867</b>	<b>14,131</b>	<b>13,515</b>	<b>13,539</b>	<b>15,646</b>	<b>17,376</b>	<b>17,725</b>	<b>15,703</b>	<b>16,308</b>
<b>YIELD (metric tons per hectare)</b>											
Brazil	1.565	1.813	1.65	1.8	1.492	1.866	1.712	1.906	1.784	1.606	1.75
Argentina	2.09	1.841	2.405	2.064	2.201	1.994	2.277	1.625	2.172	2.274	2.15
Paraguay	1.429	1.486	1.31	1.727	1.091	1.792	1.789	1.9	1.607	1.461	1.778
Bolivia	1.755	1.576	1.56	1.571	2.227	1.594	1.699	2.042	1.329	2	2.048
Other	1.697	1.9	1.712	1.832	1.947	1.881	1.732	1.627	1.689	1.711	1.828
<b>Total</b>	<b>1.659</b>	<b>1.808</b>	<b>1.809</b>	<b>1.858</b>	<b>1.658</b>	<b>1.895</b>	<b>1.869</b>	<b>1.839</b>	<b>1.877</b>	<b>1.806</b>	<b>1.879</b>
<b>PRODUCTION (1000 metric tons)</b>											
Brazil	12,835	14,750	15,541	18,278	14,100	17,300	18,021	23,200	20,340	15,500	17,500
Argentina	4,150	4,200	7,000	6,750	7,300	7,000	9,700	6,500	10,750	10,800	10,750
Paraguay	600	520	550	950	600	950	1,100	1,615	1,575	1,300	1,600
Bolivia	86	52	78	99	147	110	141	294	230	390	430
Other	168	171	113	174	259	301	284	345	375	373	362
<b>Total</b>	<b>17,839</b>	<b>19,693</b>	<b>23,282</b>	<b>26,251</b>	<b>22,406</b>	<b>25,661</b>	<b>29,246</b>	<b>31,954</b>	<b>33,270</b>	<b>28,363</b>	<b>30,642</b>

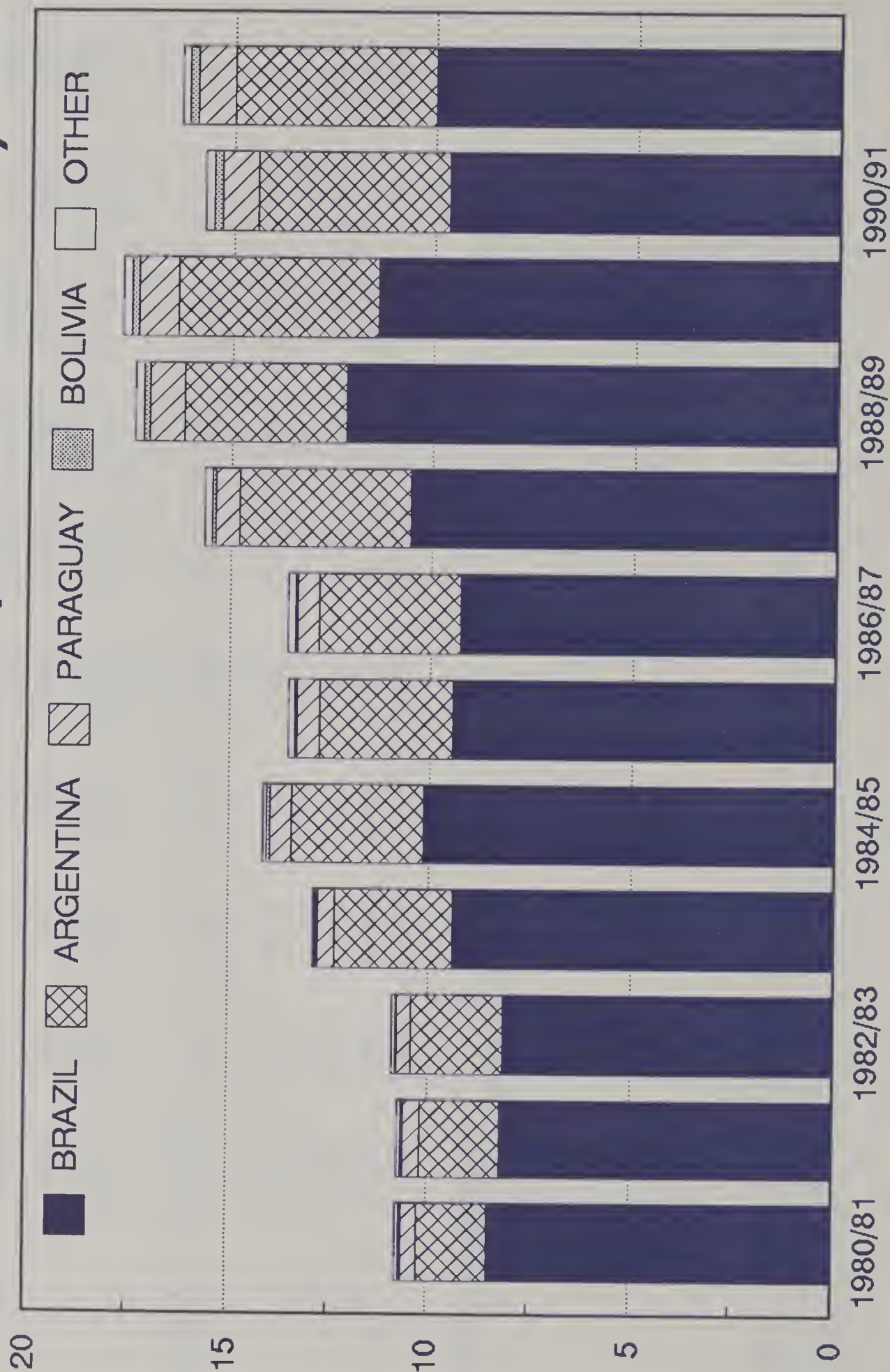
1/ includes Chile, Colombia, Ecuador, Peru, Uruguay, and Venezuela

Note: Date refers to the first year of marketing year; e.g., 1991=1991/92.



CHART 1

# South American Soybeans 1992 Harvested Area (million hectares)



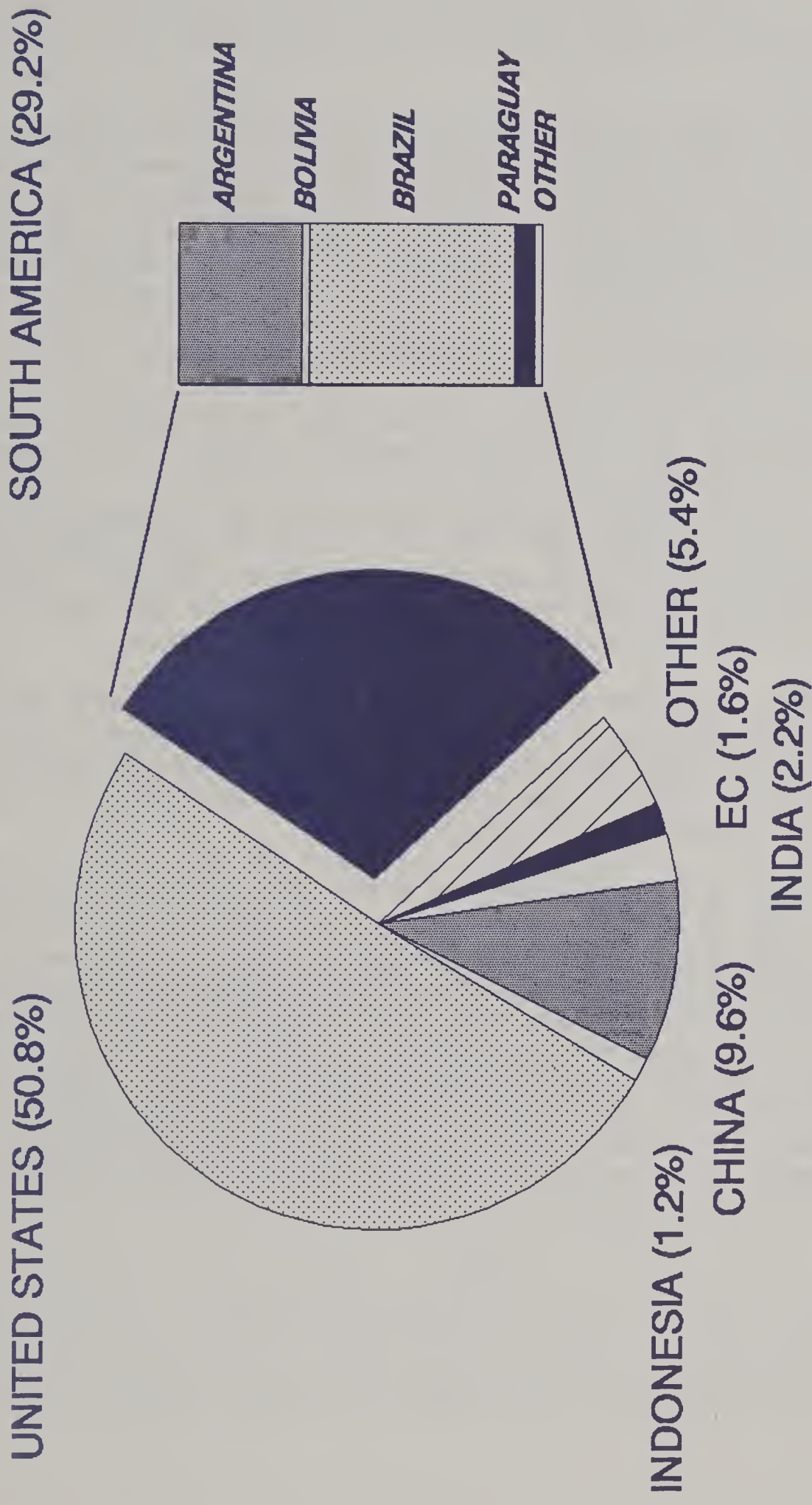
December 1991

Production Estimates and Crop Assessment Division, FAS, USDA

CHART 2

# South American Soybean Production

*Percent of World Production*





## SUNFLOWERSEED PRODUCTION IN THE SOVIET UNION

The Soviet Union is the world's largest producer of sunflowerseed, contributing about 30 percent of the total world crop. Unusually hot and dry weather in a significant portion of the Soviet sunflower-growing region depressed 1991 yields; however, 1991 production is still expected to reach 6.0 million tons. Despite its role as the world's top sunflowerseed producer, the Soviet Union continues to import about 10 percent of its domestic consumption of sunflower oil. Increased oilseed production has been set as one of the goals of Soviet agriculture.

The sunflower appeared in Russia during the sixteenth century, following its introduction to Europe from North America. Sunflowers were grown mostly for decoration or as a garden crop until 1829, when Russian farmers began to recognize their value as an oilseed crop. Sunflower cultivation then became widespread and the selection of high-oil-yielding varieties began. Sunflowerseed is currently the primary source of vegetable oil in the Soviet Union and sunflowerseed meal is a major source of high-protein livestock feed. Sunflowers are grown also for silage and green chop.

Sunflowers are grown primarily in the fertile black-soil regions of the Ukraine, Moldova, and the Russian Republic (RSFSR). The republics of Kazakhstan and Georgia are relatively minor producers. Sunflowers are grown in approximately the same areas that produce corn for grain, although the sunflower region extends farther east, into the lower Volga Valley. Soviet agricultural officials indicate that sunflower area has been "shifting" southward; less sunflowerseed is being planted in the lower-yielding northern areas and more is being sown in the southern regions.

After a slump in plantings beginning in 1979, Soviet sunflowerseed area has rebounded over the past six years. The greatest increase has taken place in the RSFSR where sunflowerseed area has risen almost 30 percent since 1986. Area also has increased steadily in the Ukraine as well as the minor-producing republics of Georgia and Kazakhstan.

Sunflowerseed yields in the Soviet Union vary significantly depending upon where the crop is grown. According to official Soviet statistics, yields are highest in Moldova. During the last three years, sunflowerseed yields in that republic averaged 27 percent higher than yields in the Ukraine and 67 percent higher than yields in the RSFSR. Yields in the minor-producing areas are lower and more erratic than yields in other republics. Although Soviet sunflowerseed yields do not match the high levels achieved in other European countries, they are comparable to yields obtained in the other major-producing countries. From 1981 through 1990, USSR yields averaged 1.33 tons per hectare, compared to 1.36 in Argentina (the world's second largest sunflowerseed producer) and 1.29 in the United States.

Proper crop rotation plays a major role in effective disease control in sunflower fields, particularly in light of recent cutbacks in the availability of plant protection agents in the Soviet Union. Soviet agronomic experts recommend that sunflowers not be planted in the same field more than once every 8-10 years in order to prevent contamination by rust, downy mildew, and other pathogens. Yields were reduced during the late 1970's when Soviet producers were planting sunflowers every 3-5 years. Fields were given a chance to recover as sunflowerseed area declined between 1978 and 1986, due in part to the increased planting of rapeseed in portions of the northern regions of the sunflowerseed area. Yields climbed steadily between 1986 and 1989, due to a combination of good weather and improved farming practices (intensive technology). During 1990, the western North Caucasus region experienced dry weather in June and heavy rains during harvest; this pulled the USSR yield down by 11 percent. Throughout much of the 1991 growing season, the sunflower crop in the northern North Caucasus region and the lower Volga Valley suffered from drought and sunflowerseed yields fell for the second year in a row.

As a result of depressed yields for the past two years, sunflowerseed production declined in both 1990 and 1991. Most of the decrease occurred in the RSFSR, which experienced the majority of the weather-related crop stress.

#### SUNFLOWERSEED PRODUCTION IN THE USSR BY REPUBLIC

Year	USSR	RSFSR	Ukraine	Moldova	Kazakhstan	Georgia
----	-----	-----	(1,000 Metric Tons)	-----	-----	-----
1985	5,254	2,621	2,288	244	93	9
1986	5,266	2,363	2,561	253	83	6
1987	6,071	3,030	2,710	209	117	5
1988	6,164	2,958	2,775	270	139	17
1989	7,070	3,789	2,885	282	105	3
1990	6,500	3,400	2,700	300	100	8

Source: USSR State Statistical Committee (GOSKOMSTAT).

Sunflowerseed meal is a major source of high-protein feed. The Soviet Union has recognized the need to achieve significant increases in dairy, poultry, and livestock production and any improvement in the performance of the dairy and livestock sector will greatly depend upon increasing not only the supply but also the quality of feed. Faced with growing demand for high-protein feed ingredients, Soviet agricultural officials have stated that it will be necessary to boost total oilseed production from about 12 million tons to 22 million. Any effort to increase production, however, would be hampered by numerous constraints, such as inadequate storage facilities, decreased deliveries of fertilizers and plant-protection agents, and shortages of machinery, fuel, spare parts, and manpower. Obsolete oilseed-crushing facilities and vegetable-oil refineries pose an even more serious problem. Many processing plants are 40-50 years old and some were even built at the turn of the century. The Soviet government has been relatively unsuccessful in attracting the help of western investors in updating oilseed-processing plants.



The central government's efforts to ensure deliveries of sunflowerseed to the All-Union Fund has encountered difficulties. State procurements have fallen since 1989 as producers have elected to keep more of their crop on the farm for feed or turn to alternative markets, such as bartering for building materials and other scarce commodities. State procurements of sunflowerseed fell short of government quotas in 1990, with only 4.6 million tons sold to the state. In the 5 years previous to 1990, when state quotas were being met, producers delivered about 80 percent of the total sunflowerseed production to the State. Last year this ratio dropped to 70 percent as growers held back their crop. Final 1991 sunflowerseed procurements have not been announced. Officials have recognized that oilseed procurement prices are too low and announced a plan in January 1991 to raise prices. However, no nationwide increase has yet gone into effect. Actual price increases have been implemented only in the Ukraine.

#### SUNFLOWERSEED PRODUCTION AND PROCUREMENT

	<u>Production (Million Tons)</u>	<u>Procurement (Million Tons)</u>	<u>Percentage Procured</u>
1985	5.3	4.2	79
1986	5.3	4.3	81
1987	6.1	4.8	79
1988	6.2	4.9	79
1989	7.1	5.6	79
1990	6.6	4.6	70

Source: USSR State Statistical Committee (GOSKOMSTAT).

The sunflowerseed situation in the Soviet Union is similar to that of corn-for-grain production. Demand from the livestock and poultry sectors remains high for domestically-produced corn and sunflowerseed, and officials have expressed the desire to increase the production of both crops. However, while climatic conditions would permit an expansion in sown area and some of the agronomic problems faced by producers (e.g., supplies of fertilizers and pesticides) could be overcome without extreme difficulty, major problems in post-harvest processing are likely to impede significant increased production.

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CHART 3

USSR SUNFLOWERSEED AREA AND PRODUCTION

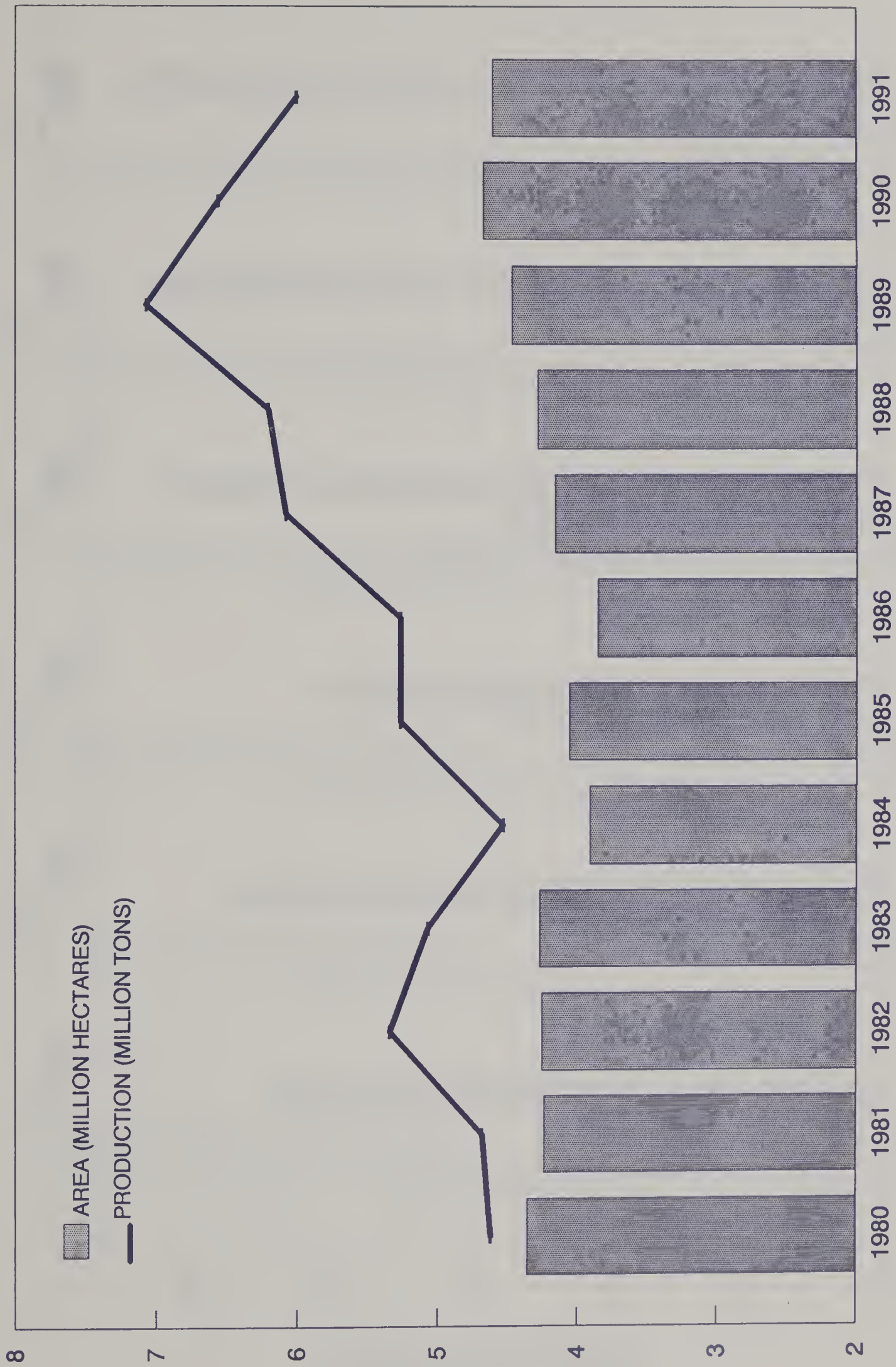




CHART 4

USSR SUNFLOWERSEED AREA BY REPUBLIC

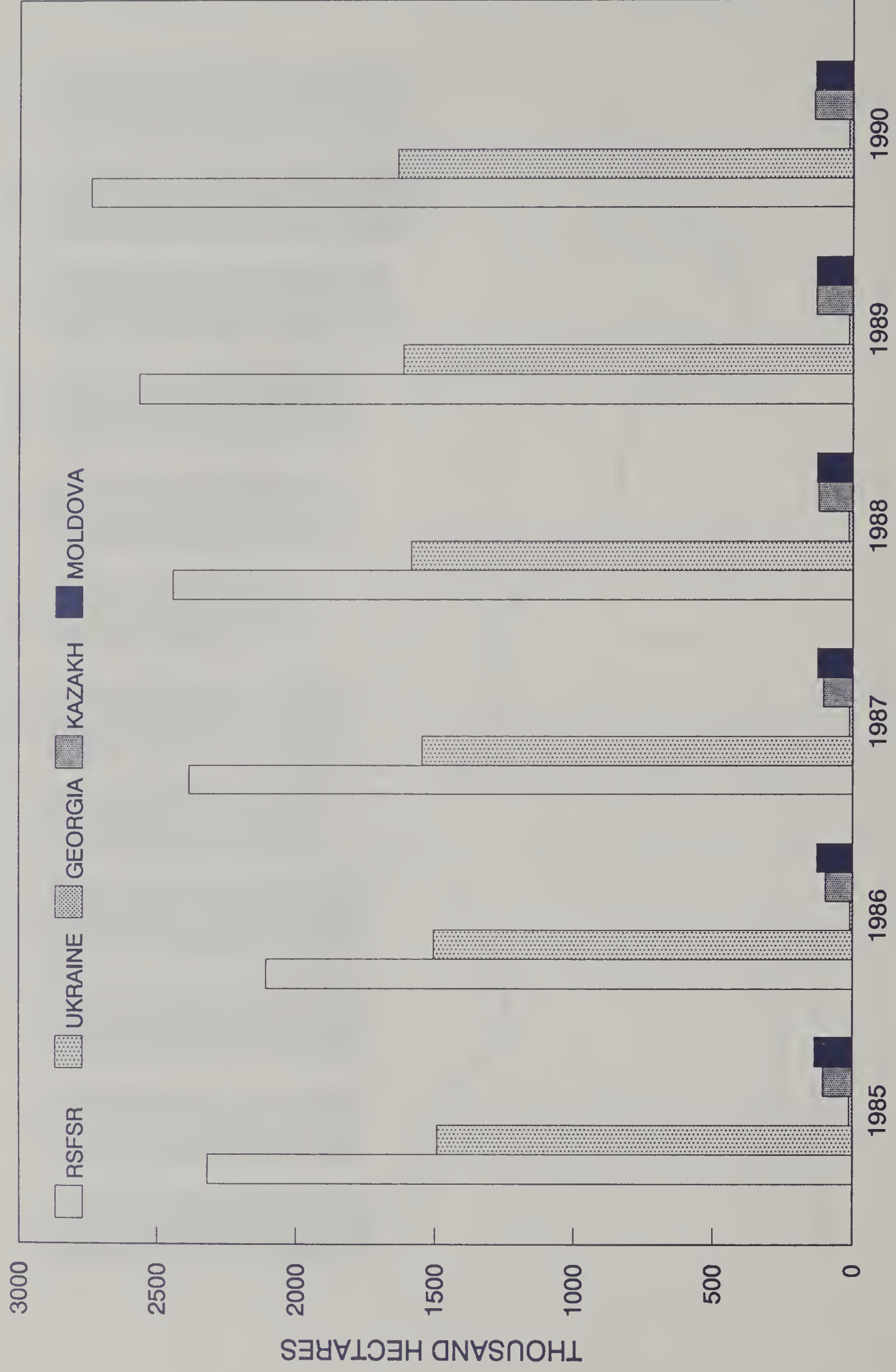
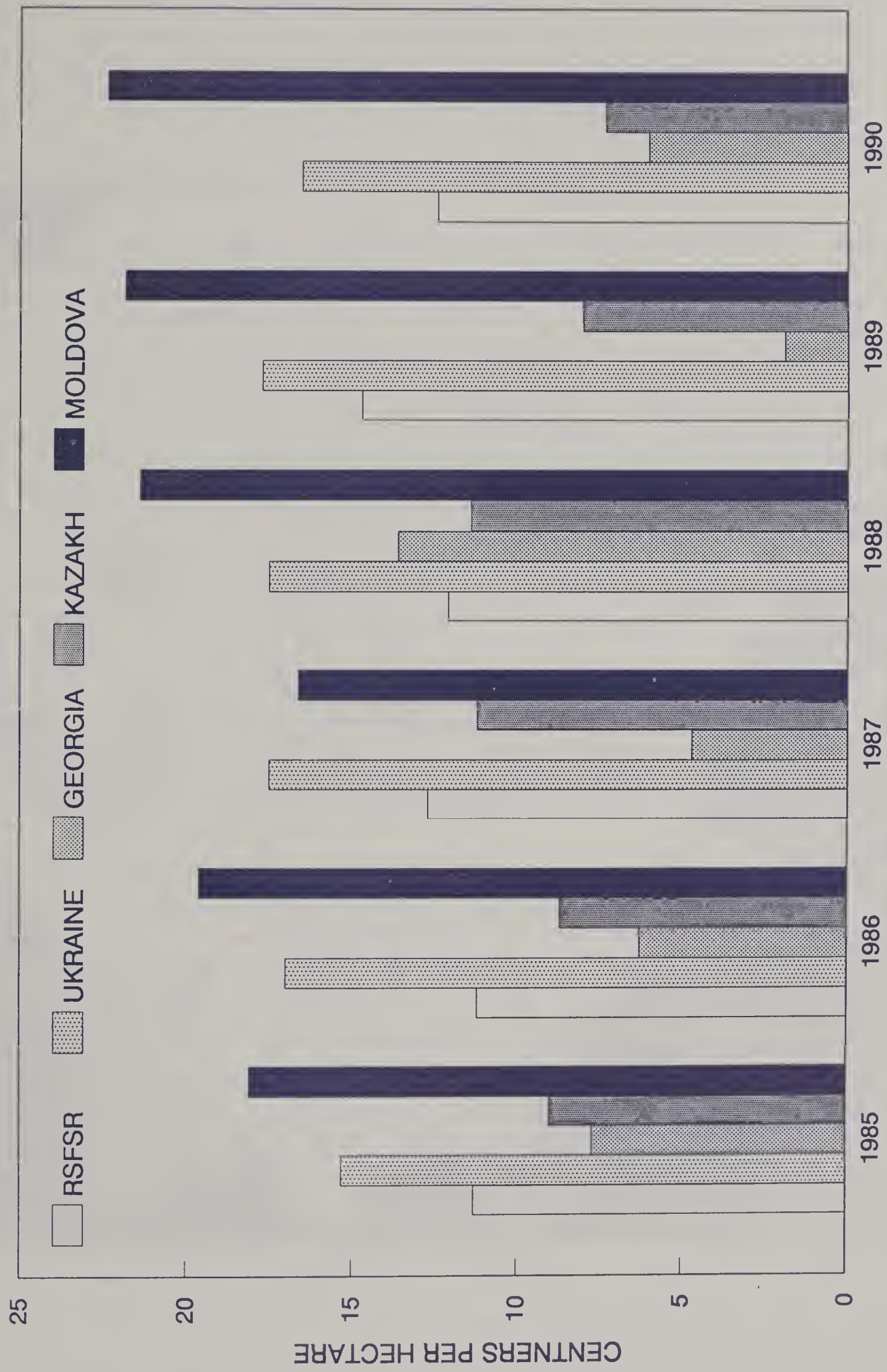


CHART 5

USSR SUNFLOWERSEED YIELDS BY REPUBLIC





MAP 2





## WORLD UNMANUFACTURED TOBACCO PRODUCTION

World tobacco production for 1991 is projected at 7.0 million tons (farm sales weight), down slightly from the June estimate and the 7.1 million 1990 production level. Production increases are projected in Zimbabwe, Argentina, Canada, Mexico, and Malawi because of more favorable weather and increased prices, and in Greece and Spain because of increased plantings and favorable weather. Declines are projected in India, Turkey, Italy, and Japan because of production controls, Brazil because of drought, and China because of reduced plantings and unfavorable weather.

Total unmanufactured tobacco production in North America for 1991 is down slightly. Production is forecast above the June estimate in Canada and Mexico. United States production is forecast at nearly 731,000 tons, slightly below the June estimate. Mexican production for 1991 is estimated at 35,000 tons, above the June projection of 33,000 and 1,000 over the 1990 production, due to significantly higher yields. During 1991, many of the tobacco farmers in Nayarit, the major tobacco growing region, planted alternate crops because they could not get production contracts with tobacco buyers. These producers lost money in 1991 on beans, watermelons, and other crops, while farmers who planted tobacco made good returns. Mexican producer associations and cigarette companies have successfully negotiated tobacco prices for the 1992 tobacco harvest and plantings are expected to be up almost 100 percent. Canadian tobacco production for 1991 is up 11 percent from June projections and 7 percent from 1990 due to increased plantings because of strong export demand for flue-cured tobacco, which accounts for almost all Canadian production.

Tobacco production in Brazil for 1991 is forecast at 419,000 tons, down 13,000 from June and 16,000 below 1990, due to lower yields in the southern states because of continued drought. The tobacco industry is helping farmers build curing barns in order to encourage them to expand plantings for the 1992 crop. Total tobacco production in Argentina for 1991 is 94,000 tons, slightly above the June forecast but 40 percent above the 1990 level of 68,000 tons. Another sharp rise in plantings is expected in 1992.

EC tobacco production for 1991 is forecast at 487,000 tons, 13 percent above the the June projection of 430,000 tons and 11 percent over the 1990 level. The 1991 output was well above the proposed EC quota of 340,000 tons. Tobacco production has been expanding because of reduced price support for other crops. Production in Greece is estimated at a record 177,650 tons, up almost 50 percent from the June estimate of 120,000. Increased plantings and excellent weather caused huge increases in the flue-cured and burley tobacco crop. Spanish tobacco production is expected to be 53,000 tons, up 20 percent from the June estimate due to favorable weather and slightly higher plantings. In Italy, 1991 tobacco production declined 7,000 tons to 213,000 compared to the June projection, slightly below the 1990 record of 215,000 tons.

South Africa's 1991 tobacco crop is estimated at 34,000 tons, down from the June projection of 39,000 due to smaller than expected flue-cured yields in the Groblersdal irrigation area, but up 5,000 from 1990. In Zimbabwe, the 1991 production is estimated at 178,000 tons, 8,000 above the June projection and 34,000 above 1990, a 24-percent increase. The national average 1991 price for flue-cured, the most important type, was Z\$11.68/kg compared to Z\$6.50/kg last year. These very high prices are expected to encourage increased plantings for 1992. In Malawi, 1991 production is estimated at 125,000 tons, 15 percent above the June estimate and 23 percent over 1990.



Chinese tobacco production for 1991 is expected to be 2,480 million tons, down 6 percent from 1990 due to smaller plantings and unfavorable weather. For 1992, production is expected to increase because of slightly higher plantings and more normal yields. The high level of tobacco production in the past few years has been due to pressure from local Governments to increase output which has been taxed as a major source of revenue. For 1992, the central government will take full control of tobacco tax income. This change should permit farmers to stabilize tobacco production at profitable levels and produce more non-tobacco crops.

Indian tobacco production for 1991 is estimated at 480,000 tons, down from the 510,000 forecast in June and the 560,000 produced in 1990. Production is down due to a 45,000 ton reduction in dark-air and sun-cured tobacco due to the lack of rain, while flue-cured and burley production were up. For 1992, production is projected to expand due to increased plantings of flue-cured and burley and better export prospects because of a 20 percent devaluation of the Rupee. Japanese tobacco production for 1991 is estimated at 71,000 tons, 5 percent below the June estimate and 9,000 below 1990. The reduction is because of abnormally cold weather and excess moisture. Flue-cured tobacco was reduced because of the ash fallout from the Mount Unzen volcano. Thailand's tobacco crop for 1991 is estimated at 75,000 tons, down slightly from the June forecast, and 1990 production. Production of flue-cured and burley tobacco was above the June forecast while oriental output was down. In 1992, production is expected to expand because of strong export demand.

South Korean tobacco production for 1991 is estimated at 69,000 tons, down 2,000 from the June estimate but still 3,000 above 1990. Production is expected to remain at this level in 1992. The Philippine 1991 tobacco crop is estimated at 79,000 tons, up slightly from the June forecast and 9,000 above 1990. In 1992, production is forecast to expand provided the burley and flue-cured seedbed losses caused by Typhoon Ruth can be replaced.

Turkey is expected to produce 243,000 tons of tobacco in 1991, up slightly from the June projection, but down 19 percent from the 1990 crop of 298,000 tons. However, the 1991 crop, based on dry weight, is down 13 percent from June and 29 percent from 1990 due to losses from blue mold that were encouraged by wet weather in July. Farmers are expected to reduce plantings in 1992 because of tighter grading standards.

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TABLE 10

TOTAL UNMANUFACTURED TOBACCO  
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
NORTH AMERICA						
Canada	31,140	29,408	30,340	75,573	63,105	67,740
Mexico	33,029	22,118	17,739	59,890	34,653	35,430
United States	274,681	296,643	309,470	620,152	737,162	730,537
REGION TOTAL	338,850	348,169	357,549	755,615	834,920	833,707
SOUTH AMERICA						
Argentina	55,248	50,155	64,610	80,544	67,624	94,443
Bolivia	1,250	1,250	1,250	1,250	1,250	1,250
Brazil	294,000	282,000	291,000	462,000	435,000	419,000
Chile	3,423	3,909	4,394	11,105	12,785	14,283
Colombia	19,007	19,604	19,879	29,348	31,580	32,478
Ecuador	1,800	1,800	1,800	3,850	3,850	3,850
Paraguay	2,740	3,040	3,065	3,545	4,045	8,050
Peru	2,500	2,500	2,500	3,100	3,100	3,100
Uruguay	800	800	800	1,400	1,400	1,400
Venezuela	7,917	8,012	8,152	13,490	13,597	12,423
REGION TOTAL	388,685	373,070	397,450	609,632	574,231	590,277
CENTRAL AMERICA						
Costa Rica	851	888	760	1,567	1,728	1,313
El Salvador	544	543	561	970	970	1,038
Guatemala	6,440	6,244	6,105	11,866	10,568	10,086
Honduras	2,531	2,640	2,753	4,246	4,605	4,614
Nicaragua	2,240	2,240	2,240	4,550	4,550	4,550
Panama	720	720	720	1,302	1,302	1,302
REGION TOTAL	13,326	13,275	13,139	24,501	23,723	22,903
CARIBBEAN						
Cuba	50,000	50,000	50,000	41,606	44,000	44,000
Dominican Rep.	27,011	14,830	18,450	28,069	15,085	25,312
Jamaica & Dep	1,175	1,175	1,175	2,339	2,339	2,339
REGION TOTAL	78,186	66,005	69,625	72,014	61,424	71,651
NORTH AFRICA						
Algeria	2,600	2,700	2,700	4,800	5,000	5,000
Libya	900	900	900	1,450	1,450	1,450
Morocco	5,483	5,788	6,325	6,551	7,171	7,953
Tunisia	4,950	6,000	6,000	5,610	6,215	6,300
REGION TOTAL	13,933	15,388	15,925	18,411	19,836	20,703
OTHER AFRICA						
Angola	3,950	3,950	3,950	3,900	3,900	3,900
Burundi	2,000	2,000	2,000	1,600	1,600	1,600
Cameroon	3,400	3,400	3,400	5,500	5,500	5,500
Congo	4,000	4,000	4,000	1,800	1,800	1,800
Cote D' Ivoire	10,000	10,000	10,000	2,490	2,490	2,490
Ethiopia	3,000	3,000	3,000	3,450	3,500	3,500
Ghana	3,950	3,950	3,950	1,433	1,839	2,080
Kenya	10,335	8,805	8,805	11,510	9,910	9,910
Madagascar	5,900	5,900	5,900	5,500	5,500	5,500
Malawi	89,640	100,110	117,100	86,615	101,652	125,360
Mozambique	2,700	2,700	2,700	2,900	2,900	2,900
Nigeria	7,700	7,300	7,300	9,223	9,223	9,223
South Africa	24,539	24,841	24,175	38,949	29,106	33,851
Tanzania	21,250	21,250	21,250	15,055	14,055	14,055
Togo	4,000	4,000	4,000	2,000	2,000	2,000
Uganda	3,500	4,300	4,300	3,200	4,000	4,000
Zaire	3,700	3,700	3,700	4,110	4,110	4,110
Zambia	3,500	3,500	3,500	4,300	4,300	4,300
Zimbabwe	60,544	62,924	71,720	135,205	139,803	177,957
REGION TOTAL	267,608	279,630	304,750	338,740	347,188	414,036
December 1991	Production Estimates and Crop Assessment Division, FAS, USDA					



TABLE 10 (Continued)

TOTAL UNMANUFACTURED TOBACCO  
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
OTHER ASIA						
Bangladesh	40,500	40,500	40,500	40,000	40,000	40,000
Burma	55,000	55,000	55,000	45,000	45,000	45,000
Cambodia	9,000	9,000	9,000	5,000	5,000	5,000
China	1,798,000	1,592,600	1,565,000	2,830,000	2,627,500	2,482,500
India	377,000	421,100	389,192	492,800	564,400	479,500
Indonesia	227,529	236,390	246,250	146,914	154,480	159,120
Japan	30,661	29,964	29,408	74,397	80,542	70,900
Korea, North	37,000	37,000	37,000	46,000	46,000	46,000
Korea, South	30,985	31,339	30,671	78,422	66,213	69,441
Laos	4,000	4,000	4,000	3,000	3,000	3,000
Malaysia	12,481	10,488	15,400	13,877	10,997	11,000
Pakistan	43,216	40,911	44,375	71,086	68,044	75,904
Philippines	50,150	49,830	52,831	73,305	70,130	78,832
Sri Lanka	12,165	12,165	12,165	9,000	9,000	9,000
Taiwan	8,019	7,941	7,755	18,986	19,131	18,800
Thailand	56,716	63,665	61,820	64,780	76,235	75,428
Vietnam	32,000	32,000	32,000	28,000	28,000	28,000
REGION TOTAL	2,824,422	2,673,893	2,632,367	4,040,567	3,913,672	3,697,425
MIDDLE EAST						
Iran	18,000	18,000	18,000	25,000	25,000	25,000
Iraq	2,000	2,000	2,000	2,180	2,180	2,180
Jordan	2,931	2,953	2,953	2,827	2,800	2,800
Lebanon	3,750	3,750	3,750	5,000	5,000	5,000
Oman	1,800	1,800	1,800	2,000	2,000	2,000
Syria	10,145	12,757	15,650	10,859	13,007	17,013
Turkey	284,542	309,244	260,850	269,517	298,152	242,624
United Arab Em.	350	350	350	2,000	2,000	2,000
Yemen	3,300	3,300	3,300	5,720	5,720	5,720
REGION TOTAL	326,818	354,154	308,653	325,103	355,859	304,337
EUROPEAN COMMUNITY						
Belgium-Lux.	438	461	500	1,800	1,553	300
France	11,413	10,704	10,700	29,216	28,295	26,573
Germany	6,955	5,880	5,001	12,464	11,147	10,500
Greece	81,471	76,459	82,700	115,750	134,368	177,650
Italy	95,165	85,121	84,000	197,316	214,643	213,000
Portugal	2,076	2,257	2,450	5,472	5,573	6,048
Spain	27,330	23,450	24,050	45,415	43,500	52,705
REGION TOTAL	224,848	204,332	209,401	407,433	439,079	486,776
Switzerland	675	671	660	1,620	1,265	1,350
EAST EUROPE						
Albania	24,000	24,000	24,000	15,000	15,000	15,000
Bulgaria	72,661	52,891	61,100	75,537	66,858	82,400
Czechoslovakia	3,750	3,750	3,750	5,500	5,000	5,500
Hungary	9,082	8,700	10,000	12,869	14,346	18,816
Poland	29,430	25,754	28,720	56,060	50,000	54,780
Romania	34,400	16,845	9,500	27,500	14,200	10,257
Yugoslavia	49,000	45,000	50,000	63,270	46,620	62,271
REGION TOTAL	222,323	176,940	187,070	255,736	212,024	249,024
USSR	113,400	110,000	107,600	239,000	257,000	257,000
OCEANIA						
Australia	4,771	4,727	4,700	13,296	13,327	13,500
New Zealand	600	600	600	1,550	1,550	1,550
REGION TOTAL	5,371	5,327	5,300	14,846	14,877	15,050
OTHER 1/	7,502	7,282	7,062	6,781	6,635	6,464
WORLD	4,825,947	4,628,136	4,616,551	7,109,999	7,061,733	6,970,703

1/ Includes Guyana, Haiti, St. Vincent, Chad, Trin & Tobag, Cent. Afr. Rep. Liberia, Mali, Mauritius, Niger, Benin, Reunion, Sierra Leone, Swaziland, Cyprus, Israel, Austria, and Solomon Is.

## WORLD UNMANUFACTURED TOBACCO PRODUCTION BY TYPE

World unmanufactured tobacco production for 1991 is estimated at 7.0 million tons, farm sales weight basis, down slightly from the June estimate and down 1 percent from 1990. Estimated production by leaf type is as follows:

	Revised	Revised	Preliminary	
	1989	1990	June 1991	December 1991
Leaf Type	-----1,000 metric tons-----			
Flue-cured	4,099	4,003	4,028	4,006
Burley	712	730	819	807
Oriental	807	825	752	813
Dark air/sun-cured	1,154	1,159	1,174	984
Light air-cured	90	75	77	78
Dark air-cured, cigar	204	212	208	217
Dark fire-cured	43	58	59	66
<u>Total</u>	7,110	7,062	7,119	6,971

NOTE: Numbers may not add due to rounding.

### FLUE-CURED

Production of flue-cured tobacco for 1991 is estimated at 4.0 million tons, up slightly from 1990 but below 1989. Since the June report, world production has declined slightly due to a 60,000 ton reduction in Chinese production. Flue-cured production for 1991 has been revised upward since June in Canada, Mexico, Malawi, Italy, and Zimbabwe due largely to higher yields. In Greece, production is double the June estimate because of increased plantings. Flue-cured production for 1991 compared to June is down in Japan, the Philippines, and Brazil because of weather problems.

### BURLEY

Production of burley tobacco for 1991 is forecast at 807,000 tons, down from the June projection, but above the 730,000 estimated for 1990. The decline since June is due to a reduction in Chinese and Italian production of 20,000 and 9,000 tons, respectively, because of lower than projected plantings. Estimates were increased by 4,000 tons each for Greece and Malawi because plantings were above June projections.

### ORIENTAL

Production of oriental tobacco is estimated at 813,000 tons, up 8 percent from the June estimate, but 1 percent below 1990 production. Output in Turkey, the largest producer, was revised upward for both 1990 and 1991 by 6 and 20 percent, respectively, because of increased area and yields, compared to June projections. However, large losses are projected for 1991 because of blue mold in unmanufactured tobacco stocks. Turkey's farm sales weight production of oriental tobacco is down 19 percent from last year at 241,000 tons, while dry weight production is down 30 percent to 174,000 tons. In Greece, increased yields raised the oriental production to 122,000 tons, 36 percent above the June estimate.



## DARK-AIR/SUN-CURED

Production of dark-air/sun-cured tobacco is estimated at 1.0 million tons, down 16 percent from the June estimate of 1.2 million and 15 percent below 1990. The declines are due to lower production in three of the major production areas -- China, India, and Italy. In China, both area and yields were down from June projections, while in India only yields were reduced. In Italy, plantings were revised down for both 1990 and 1991.

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TABLE 11

FLUE-CURED TOBACCO  
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
NORTH AMERICA						
Canada	30,640	28,948	30,000	74,456	62,150	67,000
Mexico	7,012	7,160	3,590	14,410	11,380	7,470
United States	158,242	168,785	164,737	366,665	426,034	391,903
REGION TOTAL	195,894	204,893	198,327	455,531	499,564	466,373
SOUTH AMERICA						
Argentina	31,600	29,500	32,480	48,325	43,645	58,520
Brazil	167,000	157,000	165,000	310,000	295,000	278,000
Chile	1,102	1,186	1,340	3,071	3,521	3,830
Colombia	2,944	2,971	2,810	5,117	5,222	5,185
Ecuador	650	650	650	1,575	1,575	1,575
Peru	1,200	1,200	1,200	1,820	1,820	1,820
Uruguay	665	665	665	1,250	1,250	1,250
Venezuela	4,997	5,097	5,362	8,350	8,512	8,000
REGION TOTAL	210,158	198,269	209,507	379,508	360,545	358,180
CENTRAL AMERICA						
Costa Rica	265	250	252	489	539	481
El Salvador	377	377	366	621	621	670
Guatemala	838	763	713	1,357	1,419	1,182
Honduras	561	694	909	954	1,366	1,453
Nicaragua	500	500	500	1,000	1,000	1,000
Panama	100	100	100	180	180	180
REGION TOTAL	2,641	2,684	2,840	4,601	5,125	4,966
CARIBBEAN						
Dominican Rep.	1,413	1,590	1,660	2,796	3,176	3,312
Jamaica and Dep	547	547	547	1,212	1,212	1,212
REGION TOTAL	1,960	2,137	2,207	4,008	4,388	4,524
Morocco	34	47	45	79	102	103
OTHER AFRICA						
Angola	3,200	3,200	3,200	3,200	3,200	3,200
Ethiopia	1,500	1,500	1,500	1,725	1,750	1,750
Ghana	2,805	3,160	3,230	1,024	1,464	1,700
Kenya	7,600	5,500	5,500	8,492	5,920	5,920
Madagascar	750	750	750	1,200	1,200	1,200
Malawi	16,500	16,600	17,500	19,835	21,818	25,750
Mozambique	1,270	1,270	1,270	1,350	1,350	1,350
Nigeria	1,500	1,100	1,100	1,752	1,752	1,752
South Africa	20,460	20,465	20,500	34,050	24,760	29,885
Tanzania	18,218	18,218	18,218	13,000	11,000	11,000
Uganda	1,350	2,150	2,150	1,200	2,000	2,000
Zaire	880	880	880	1,400	1,400	1,400
Zambia	2,850	2,850	2,850	3,500	3,500	3,500
Zimbabwe	57,660	59,425	67,000	129,960	133,866	170,000
REGION TOTAL	136,543	137,068	145,648	221,688	214,980	260,407
December 1991	Production Estimates and Crop Assessment Division, FAS, USDA					



TABLE 11 (Continued)

FLUE-CURED TOBACCO  
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
OTHER ASIA						
Bangladesh	12,000	12,000	12,000	13,000	13,000	13,000
Burma	5,800	5,800	5,800	13,200	13,200	13,200
Cambodia	2,600	2,600	2,600	1,200	1,200	1,200
China	1,503,000	1,342,000	1,333,000	2,405,000	2,259,000	2,200,000
India	105,470	88,600	103,342	116,210	100,840	109,500
Indonesia	64,000	75,500	79,000	42,300	49,980	52,450
Japan	19,752	19,660	19,595	46,556	50,540	45,300
Korea, North	15,100	15,100	15,100	18,400	18,400	18,400
Korea, South	22,329	22,595	21,390	54,020	46,037	46,511
Laos	1,150	1,150	1,150	1,025	1,025	1,025
Malaysia	12,311	10,168	15,000	13,637	10,517	10,400
Pakistan	10,971	11,516	14,000	23,790	24,988	29,400
Philippines	29,000	29,300	29,600	40,684	41,610	42,900
Sri Lanka	6,117	6,117	6,117	4,909	4,909	4,909
Taiwan	8,019	7,941	7,755	18,986	19,131	18,800
Thailand	23,373	24,775	26,000	29,684	32,500	33,500
Vietnam	12,000	12,000	12,000	9,800	9,800	9,800
REGION TOTAL	1,852,992	1,686,822	1,703,449	2,852,401	2,696,677	2,650,295
MIDDLE EAST						
Iran	2,750	2,750	2,750	5,300	5,300	5,300
Jordan	2,931	2,953	2,953	2,827	2,800	2,800
Syria	1,769	1,158	1,900	3,501	2,828	3,800
Turkey	821	750	750	1,812	2,000	1,500
Yemen	3,300	3,300	3,300	5,720	5,720	5,720
REGION TOTAL	11,571	10,911	11,653	19,160	18,648	19,120
EUROPEAN COMMUNITY						
France	2,650	2,601	2,800	5,425	5,152	5,485
Germany	1,861	1,707	2,300	2,507	2,397	3,900
Greece	3,597	7,600	15,500	9,400	29,600	45,500
Italy	21,850	23,633	24,000	36,685	54,023	55,000
Portugal	1,612	1,838	2,000	4,022	4,350	4,733
Spain	10,500	13,700	13,800	21,300	27,000	35,365
REGION TOTAL	42,070	51,079	60,400	79,339	122,522	149,983
EAST EUROPE						
Bulgaria	9,000	7,200	7,500	8,200	10,200	12,000
Czechoslovakia	3,000	3,000	3,000	4,400	4,000	4,400
Hungary	5,100	5,150	5,400	6,956	8,484	10,160
Poland	13,532	11,206	13,000	23,611	20,170	23,000
Romania	6,900	3,370	2,375	5,175	2,680	3,955
Yugoslavia	12,000	16,000	16,000	17,205	17,760	20,646
REGION TOTAL	49,532	45,926	47,275	65,547	63,294	74,161
OCEANIA						
Australia	4,771	4,727	4,700	13,296	13,327	13,500
New Zealand	583	583	583	1,520	1,520	1,520
REGION TOTAL	5,354	5,310	5,283	14,816	14,847	15,020
OTHER 1/	2,983	2,983	2,983	2,394	2,394	2,394
WORLD	2,511,732	2,348,129	2,389,617	4,099,072	4,003,086	4,005,526

1/ Includes Guyana, Haiti, Trinidad & Tobago, Benin, Mali, Mauritius, Reunion, Mali, Sierra Leone, and Cyprus.

December 1991      Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 12

BURLEY TOBACCO  
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
NORTH AMERICA						
Mexico	13,584	10,917	10,225	26,180	18,013	21,360
United States	98,967	109,555	125,304	218,891	270,488	297,250
REGION TOTAL	112,551	120,472	135,529	245,071	288,501	318,610
SOUTH AMERICA						
Argentina	13,100	13,200	23,010	20,190	17,450	28,830
Brazil	37,000	35,000	34,000	59,000	57,000	53,000
Chile	2,154	2,531	2,890	7,629	8,639	10,050
Colombia	1,978	2,481	2,569	2,877	3,870	4,038
Ecuador	700	700	700	1,700	1,700	1,700
Paraguay	40	65	65	45	50	50
Peru	400	400	400	380	380	380
Uruguay	65	65	65	50	50	50
Venezuela	2,920	2,915	2,790	5,140	5,085	4,423
REGION TOTAL	58,357	57,357	66,489	97,011	94,224	102,521
CENTRAL AMERICA						
Costa Rica	148	150	119	266	236	189
El Salvador	167	166	195	349	349	368
Guatemala	5,278	5,191	5,039	10,086	8,824	8,480
Honduras	1,300	1,217	1,050	1,729	1,572	1,450
Nicaragua	1,150	1,150	1,150	2,300	2,300	2,300
Panama	380	380	380	1,000	1,000	1,000
REGION TOTAL	8,423	8,254	7,933	15,730	14,281	13,787
DOMINICAN REP.	962	1,075	1,090	1,641	2,091	2,400
NORTH AFRICA						
Libya	360	360	360	859	859	859
Morocco	5,323	5,640	6,200	6,030	6,667	7,500
Tunisia	4,950	6,000	6,000	5,610	6,215	6,300
REGION TOTAL	10,633	12,000	12,560	12,499	13,741	14,659
OTHER AFRICA						
Angola	250	250	250	200	200	200
Kenya	235	250	250	288	278	278
Madagascar	2,150	2,150	2,150	1,545	1,545	1,545
Malawi	52,000	53,000	60,000	61,212	64,019	75,000
Mozambique	950	950	950	1,150	1,150	1,150
South Africa	285	109	125	174	113	116
Swaziland	100	100	100	100	100	100
Tanzania	200	200	200	55	55	55
Zaire	650	650	650	660	660	660
Zambia	650	650	650	800	800	800
Zimbabwe	2,684	3,267	4,375	5,207	5,893	7,893
REGION TOTAL	60,154	61,576	69,700	71,391	74,813	87,797
December 1991	Production Estimates and Crop Assessment Division, FAS, USDA					



TABLE 12 (Continued)

BURLEY TOBACCO  
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
OTHER ASIA						
Bangladesh	350	350	350	280	280	280
China	60,000	25,000	30,000	75,000	40,000	40,000
India	2,865	8,300	12,200	2,560	8,200	12,000
Indonesia	35	40	50	44	50	70
Japan	9,040	8,560	8,395	23,695	25,785	22,500
Korea, South	8,656	8,744	9,281	24,402	20,176	22,930
Malaysia	170	320	400	240	480	600
Pakistan	270	322	300	530	600	570
Philippines	9,000	8,500	9,200	19,300	17,260	22,500
Sri Lanka	843	843	843	1,347	1,347	1,347
Thailand	6,843	8,200	9,420	16,765	20,500	24,300
REGION TOTAL	98,072	69,179	80,439	164,163	134,678	147,097
MIDDLE EAST						
Syria	1,579	1,471	1,800	3,105	3,492	3,600
Turkey	52	60	60	116	120	100
REGION TOTAL	1,631	1,531	1,860	3,221	3,612	3,700
EUROPEAN COMMUNITY						
France	1,190	1,395	1,500	3,098	3,780	3,789
Germany	3,130	2,614	1,151	5,926	5,230	2,650
Greece	1,732	1,800	3,200	4,600	4,268	10,150
Italy	12,960	16,244	18,000	39,134	54,682	61,000
Portugal	464	419	450	1,450	1,223	1,315
Spain	16,000	9,200	9,700	23,200	15,600	16,460
REGION TOTAL	35,476	31,672	34,001	77,408	84,783	95,364
Switzerland	675	671	660	1,620	1,265	1,350
EAST EUROPE						
Bulgaria	3,500	3,400	3,600	4,100	4,200	5,400
Czechoslovakia	750	750	750	1,100	1,000	1,100
Hungary	130	120	150	199	200	257
Poland	2,347	2,984	3,400	3,098	4,030	4,590
Romania	8,600	4,200	1,900	8,170	4,175	2,109
Yugoslavia	3,000	2,000	3,000	4,995	3,330	4,995
REGION TOTAL	18,327	13,454	12,800	21,662	16,935	18,451
New Zealand	17	17	17	30	30	30
OTHER 1/	736	636	726	845	868	857
WORLD	406,014	377,894	423,804	712,292	729,822	806,623

1/ Includes Haiti, Austria and Ghana.

December 1991      Production Estimates and Crop Assessment Division, FAS, USDA

TABLE 13

ORIENTAL TOBACCO  
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
NORTH, SOUTH & CENT. AMERICA						
Mexico	0	310	160	0	210	140
Chile	100	90	85	161	148	123
Costa Rica	421	430	355	790	882	606
Guatemala	143	76	143	166	81	152
Honduras	22	33	14	22	27	12
Panama	40	40	40	9	9	9
REGION TOTAL	726	979	797	1148	1357	1042
Libya	240	240	240	58	58	58
OTHER AFRICA						
Ethiopia	1,500	1,500	1,500	1,725	1,750	1,750
Malawi	600	450	1,100	296	180	510
South Africa	1,015	964	1,000	575	533	525
Zimbabwe	200	232	345	38	44	64
REGION TOTAL	3,315	3,146	3,945	2,634	2,507	2,849
OTHER ASIA						
China	3,100	5,000	6,000	6,200	6,500	7,500
Pakistan	11,321	10,493	11,000	21,000	18,360	19,800
Philippines	150	30	31	146	30	32
Thailand	8,500	14,330	10,600	8,791	15,055	9,728
REGION TOTAL	23,071	29,853	27,631	36,137	39,945	37,060
MIDDLE EAST						
Cyprus	17	17	17	11	11	11
Iran	10,470	10,470	10,470	12,500	12,500	12,500
Iraq	2,000	2,000	2,000	2,180	2,180	2,180
Israel	400	200	0	280	120	0
Lebanon	3,750	3,750	3,750	5,000	5,000	5,000
Syria	6,552	9,883	11,450	4,146	6,430	9,113
Turkey	283,626	308,394	260,000	267,563	296,008	241,000
REGION TOTAL	306,815	334,714	287,687	291,680	322,249	269,804
EUROPEAN COMMUNITY						
Greece	76,142	67,059	64,000	101,750	100,500	122,000
Italy	13,374	10,823	11,000	21,848	19,021	20,000
REGION TOTAL	89,516	77,882	75,000	123,598	119,521	142,000
EAST EUROPE						
Bulgaria	60,161	42,291	50,000	63,237	52,458	65,000
Romania	10,300	5,040	1,900	8,140	4,185	1,793
Yugoslavia	34,000	27,000	31,000	41,070	25,530	36,630
REGION TOTAL	104,461	74,331	82,900	112,447	82,173	103,423
USSR	113,400	110,000	107,600	239,000	257,000	257,000
WORLD	641,544	631,145	585,800	806,702	824,810	813,236
DECEMBER 1991	Production Estimates and Crop Assessment Division, FAS, USDA					



TABLE 14

DARK AIR/SUN-CURED TOBACCO  
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
NORTH AMERICA						
Canada	446	410	300	1,014	855	650
United States	1,434	1,409	1,810	2,963	3,469	4,114
REGION TOTAL	1,880	1,819	2,110	3,977	4,324	4,764
SOUTH AMERICA						
Argentina	9,800	6,800	8,350	10,950	5,640	6,340
Bolivia	1,250	1,250	1,250	1,250	1,250	1,250
Brazil	76,000	76,000	76,000	71,000	62,000	67,000
Chile	67	102	79	244	477	280
Colombia	12,662	12,742	13,170	19,226	20,330	21,235
Ecuador	325	325	325	450	450	450
Paraguay	2,700	2,975	3,000	3,500	3,995	8,000
Peru	800	800	800	800	800	800
REGION TOTAL	103,604	100,994	102,974	107,420	94,942	105,355
Dominican Rep.	24,636	12,165	15,700	23,632	9,818	19,600
NORTH AFRICA						
Algeria	2,600	2,700	2,700	4,800	5,000	5,000
Libya	300	300	300	533	533	533
Morocco	126	101	80	442	402	350
REGION TOTAL	3,026	3,101	3,080	5,775	5,935	5,883
OTHER AFRICA						
Angola	500	500	500	500	500	500
Burundi	2,000	2,000	2,000	1,600	1,600	1,600
Congo	2,200	2,200	2,200	750	750	750
Cote D' Ivoire	10,000	10,000	10,000	2,490	2,490	2,490
Madagascar	1,000	1,000	1,000	1,300	1,300	1,300
Malawi	2,640	4,660	5,500	372	1,635	2,100
Mali	333	333	333	183	183	183
Mozambique	400	400	400	230	230	230
Nigeria	1,200	1,200	1,200	1,070	1,070	1,070
South Africa	2,479	2,865	2,200	3,700	3,450	3,040
Swaziland	100	100	100	100	100	100
Togo	2,000	2,000	2,000	1,000	1,000	1,000
Zaire	450	450	450	532	532	532
REGION TOTAL	25,302	27,708	27,883	13,827	14,840	14,895
December 1991	Production Estimates and Crop Assessment Division, FAS, USDA					

TABLE 14 (Continued)

DARK AIR/SUN-CURED TOBACCO  
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
OTHER ASIA						
Bangladesh	21,515	21,515	21,515	19,685	19,685	19,685
Burma	49,200	49,200	49,200	31,800	31,800	31,800
Cambodia	6,400	6,400	6,400	3,800	3,800	3,800
China	199,900	150,000	125,000	270,800	237,000	150,000
India	262,165	321,400	270,100	363,530	451,360	352,500
Indonesia	149,894	147,100	153,200	84,170	83,850	85,800
Korea, North	15,100	15,100	15,100	18,400	18,400	18,400
Laos	2,850	2,850	2,850	1,975	1,975	1,975
Pakistan	19,143	17,316	17,500	21,006	19,966	21,000
Sri Lanka	1,726	1,726	1,726	1,654	1,654	1,654
Vietnam	20,000	20,000	20,000	18,200	18,200	18,200
REGION TOTAL	747,893	752,607	682,591	835,020	887,690	704,814
MIDDLE EAST						
Iran	4,780	4,780	4,780	7,200	7,200	7,200
Oman	1,800	1,800	1,800	2,000	2,000	2,000
United Arab Em.	350	350	350	2,000	2,000	2,000
REGION TOTAL	6,930	6,930	6,930	11,200	11,200	11,200
EUROPEAN COMMUNITY						
France	7,573	6,708	6,400	20,693	19,363	17,299
Germany	658	280	280	1130	470	470
Italy	41,654	28,841	25,000	91,536	75,640	65,000
REGION TOTAL	49,885	35,829	31,680	113,359	95,473	82,769
EAST EUROPE						
Albania	24,000	24,000	24,000	15,000	15,000	15,000
Poland	9,305	7,870	8,300	18,431	15,930	16,600
Romania	8,600	4,235	3,325	6,015	3,160	2,400
REGION TOTAL	41,905	36,105	35,625	39,446	34,090	34,000
OTHERS 1/	981	786	731	799	765	769
WORLD	1,006,042	978,044	909,304	1,154,455	1,159,077	984,049

1/ Includes Solomon Is., Uruguay, Panama, Haiti, Ghana, St. Vincent and Benin.

December 1991      Production Estimates and Crop Assessment Division, FAS, USDA



TABLE 15

LIGHT AIR-CURED TOBACCO  
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
NORTH AMERICA						
Mexico	7,585	2,931	2,060	13,770	4,090	3,630
United States	4,577	4,332	4,534	6,941	7,400	8,056
REGION TOTAL	12,162	7,263	6,594	20,711	11,490	11,686
SOUTH AMERICA						
Argentina	700	620	738	1,047	855	733
Brazil	8,000	8,000	10,000	13,000	13,000	14,000
Colombia	1,008	1,023	850	1,527	1,558	1,300
Peru	100	100	100	100	100	100
REGION TOTAL	9,808	9,743	11,688	15,674	15,513	16,133
CENTRAL AMERICA						
Guatemala	181	214	210	257	244	272
Honduras	108	126	200	163	181	226
Nicaragua	140	140	140	300	300	300
REGION TOTAL	429	480	550	720	725	798
OTHER AFRICA						
Cameroon	810	810	810	600	600	600
Congo	1,800	1,800	1,800	1,050	1,050	1,050
Madagascar	2,000	2,000	2,000	1,455	1,455	1,455
Niger	1,000	1,000	1,000	930	930	930
Nigeria	5,000	5,000	5,000	6,401	6,401	6,401
Reunion	100	100	100	100	100	100
South Africa	300	438	350	450	250	285
Zaire	370	370	370	532	532	532
REGION TOTAL	11,380	11,518	11,430	11,518	11,318	11,353
OTHER ASIA						
Bangladesh	6,135	6,135	6,135	6,580	6,580	6,580
India	6,500	2,800	3,550	10,500	4,000	5,500
Japan	1,869	1,744	1,418	4,146	4,217	3,100
Korea	6,800	6,800	6,800	9,200	9,200	9,200
Pakistan	1,511	1,264	1,575	4,760	4,130	5,134
Sri Lanka	3,479	3,479	3,479	1,090	1,090	1,090
REGION TOTAL	26,294	22,222	22,957	36,276	29,217	30,604
MIDDLE EAST						
Syria	245	245	500	107	257	500
EUROPEAN COMMUNITY						
Germany	1,306	1,279	1,270	2,901	3,050	3,480
Italy	1,635	1,623	2,000	2,248	3,234	3,500
REGION TOTAL	2,941	2,902	3,270	5,149	6,284	6,980
=====						
WORLD	63,259	54,373	56,989	90,155	74,804	78,054
=====						
December 1991	Production Estimates and Crop Assessment Division, FAS, USDA					

TABLE 16

DARK AIR-CURED TOBACCO, CIGAR  
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
NORTH AMERICA						
Canada	54	50	40	103	100	90
Mexico	3,623	0	1,004	4,400	0	1,880
United States	5,350	6,311	6,611	11,573	13,905	14,496
REGION TOTAL	9,027	6,361	7,655	16,076	14,005	16,466
SOUTH AMERICA						
Brazil	6,000	6,000	6,000	9,000	8,000	7,000
Colombia	415	387	480	601	600	720
Ecuador	125	125	125	125	125	125
REGION TOTAL	6,540	6,512	6,605	9,726	8,725	7,845
CENTRAL AMERICA						
Honduras	540	570	580	1,378	1,459	1,473
Nicaragua	450	450	450	950	950	950
Panama	180	180	180	95	95	95
REGION TOTAL	1,170	1,200	1,210	2,423	2,504	2,518
CARIBBEAN						
Cuba	50,000	50,000	50,000	41,606	44,000	44,000
Jamaica and Dep	628	628	628	1,127	1,127	1,127
REGION TOTAL	50,628	50,628	50,628	42,733	45,127	45,127
OTHER AFRICA						
Cameroon	2,590	2,590	2,590	4,900	4,900	4,900
Cent. Afr. Rep.	750	750	750	650	650	650
Uganda	2,150	2,150	2,150	2,000	2,000	2,000
REGION TOTAL	5,490	5,490	5,490	7,550	7,550	7,550
OTHER ASIA						
Bangladesh	500	500	500	455	455	455
China	32,000	70,600	71,000	73,000	85,000	85,000
Indonesia	13,600	13,750	14,000	20,400	20,600	20,800
Philippines	12,000	12,000	14,000	13,175	11,230	13,400
Thailand	18,000	16,360	15,800	9,540	8,180	7,900
REGION TOTAL	76,100	113,210	115,300	116,570	125,465	127,555
EUROPEAN COMMUNITY						
Belgium-Lux	438	461	500	1,800	1,553	300
Spain	830	550	550	915	900	880
REGION TOTAL	1,268	1,011	1,050	2,715	2,453	1,180
EAST EUROPE						
Hungary	3,852	3,430	4,450	5,714	5,662	8,399
Poland	133	46	20	201	70	30
REGION TOTAL	3,985	3,476	4,470	5,915	5,732	8,429
OTHER 1/	295	333	309	290	337	303
WORLD	154,503	188,221	192,717	203,998	211,898	216,973

1/ Includes Costa Rica, St. Vincent, Chad and Turkey.

December 1991      Production Estimates and Crop Assessment Division, FAS, USDA



TABLE 17

DARK FIRE-CURED TOBACCO  
AREA AND PRODUCTION, WORLD AND SELECTED REGIONS

REGION AND COUNTRY	---AREA---			---PRODUCTION---		
	1989	1990	1991 (FORECAST)	1989	1990	1991 (FORECAST)
	-----HECTARES-----			-----METRIC TONS-----		
NORTH AMERICA						
Mexico	1,225	800	700	1,130	960	950
United States	6,111	6,251	6,474	13,119	15,866	14,718
REGION TOTAL	7,336	7,051	7,174	14,249	16,826	15,668
SOUTH AMERICA						
Argentina	48	35	32	32	34	20
OTHER AFRICA						
Benin	66	66	66	133	133	133
Ghana	395	315	190	148	139	100
Kenya	2,500	3,055	3,055	2,730	3,712	3,712
Liberia	10	10	10	10	10	10
Malawi	17,900	25,400	33,000	4,900	14,000	22,000
Mali	333	333	333	183	183	183
Mozambique	80	80	80	170	170	170
Sierra Leone	198	198	198	200	200	200
Tanzania	2,832	2,832	2,832	2,000	3,000	3,000
Togo	2,000	2,000	2,000	1,000	1,000	1,000
Zaire	1,350	1,350	1,350	986	986	986
REGION TOTAL	27,664	35,639	43,114	12,460	23,533	31,494
EUROPEAN COMMUNITY						
Italy	3,692	3,957	4,000	5,865	8,043	8,500
EAST EUROPE						
Poland	4,113	3,648	4,000	10,719	9,800	10,560
=====						
WORLD	42,853	50,330	58,320	43,325	58,236	66,242
=====						
December 1991	Production Estimates and Crop Assessment Division, FAS, USDA					

## TOBACCO PRODUCTION PROSPECTS FOR 1992 IN SELECTED COUNTRIES

Tobacco production forecasts for 1992 in selected countries are up 320,000 tons, 7 percent above their 1991 production levels. Forecasts are up in Argentina, Brazil, China, India, Japan, Malawi, Mexico, the Philippines, South Africa, Spain, Thailand, and Zimbabwe. Production is projected to decline in Turkey, with no changes forecast in Canada and South Korea. In China, the world's largest producer, production for 1992 is projected up 3 percent following a 1991 crop that was down 6 percent from 1990, due to reduced plantings and weather-reduced yields. Production in India and Brazil is projected to be up 9 and 21 percent, respectively, while output in Turkey may decline 8 percent.

### SOUTHERN HEMISPHERE

Southern Hemisphere tobacco production for 1992 is forecast to increase over 1991 as projected plantings are up in all countries. Argentine production is projected at 130,350 tons, a new record, up 38 percent from 1991 after a 40-percent increase in 1990. Prices for the 1992 crop are projected 5-10 percent above last year. Production has been expanding because of strong export demand and sharply reduced government regulations. In Brazil, plantings of the 1992 crop are up 7 percent, but drought conditions in the south will limit expansion of flue-cured and burley tobacco.

Malawi is expected to produce over 130,000 tons of tobacco in 1992, a 4-percent increase over the 1991 production of 125,000 tons. Farm prices, up 20 percent over the 1991 level, caused increased plantings and the application of more yield-increasing inputs. Weather conditions this year are not as favorable as last year and, as a consequence, yields are expected to be down for flue-cured and burley, the major export types. In Zimbabwe, 1992 tobacco production is projected up 13 percent to 201,060 tons due to increased plantings encouraged by very favorable prices for the 1991 crop.

### NORTHERN HEMISPHERE

Production prospects in the Northern Hemisphere, where the bulk of the plantings for the 1992 crop is still months away, are mixed. In Canada, the 1992 production is projected up slightly to 68,000 tons. Production for 1991 was up due to increased plantings to meet expanded foreign demand for flue-cured tobacco, the only major type grown. Mexican tobacco production for 1992 is projected at 70,000 tons, double the 1991 level, due to a 100-percent increase in planted area. In 1991, tobacco farmers who switched to alternate crops lost money, while those who planted tobacco made a profit. Private buyers offered farmers 12 percent higher prices for the 1992 crop for both burley and flue-cured tobacco. This caused large increases in planted area of these types.



Thailand is expected to increase production of tobacco by 16 percent, to 88,000 tons, because of increased plantings due to favorable farm prices. Korean production for 1992 is projected up slightly over 1991, assuming a return to more normal yields. Japanese tobacco production for 1992 is projected up about 4 percent, to 73,400 tons. The reduced 1991 crop was affected by excessive rain, below normal temperatures, and volcanic ash from Mount Unzen. Philippine production for 1992 is projected to increase 6 percent, to 84,000 tons, provided flue-cured and burley seedbeds damaged by typhoon Ruth can be replanted. If the beds cannot be replaced, production could fall to 65,000 tons.

Indian tobacco production for 1992 is projected at 521,000 tons, 9 percent over the 1991 production of 480,000 tons due to increased plantings. In Turkey, 1992 tobacco production is projected to fall 8 percent to 222,000 tons due to lower plantings as a result of reduced support prices.

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TABLE 18

TOBACCO PRODUCTION FOR SELECTED COUNTRIES

	Area (Hectares)		Farm Sales (Metric Tons)	
	<u>1991</u>	<u>1992</u>	<u>1991</u>	<u>1992</u>
Argentina	64,610	79,725	94,443	130,350
Brazil	291,000	310,000	419,000	505,000
Canada	30,340	31,640	67,740	68,000
China	1,565,000	1,578,000	2,482,500	2,563,000
India	389,192	437,700	479,500	521,000
Japan	29,408	27,300	70,900	73,400
Malawi	117,100	121,500	125,360	130,300
Mexico	17,739	34,300	35,430	69,650
Philippines	52,831	56,775	78,832	83,830
South Africa	24,175	24,300	33,851	36,075
South Korea	30,671	30,700	69,441	69,556
Spain	24,050	25,000	52,705	54,690
Thailand	61,820	67,200	75,428	87,780
Turkey	260,850	240,850	242,624	221,824
Zimbabwe	71,720	86,270	177,957	201,060
TOTAL	3,030,506	3,151,260	4,505,711	4,815,515

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Production Estimates and Crop Assessment Division, FAS, USDA



## WORLD COFFEE PRODUCTION

World 1991/92 green coffee production is estimated at 101.1 million 60-kilogram bags, down slightly from the 101.2 million harvested last year, but up 1 percent from the first forecast made in June (see Circular Series WAP 6-91). South American production is estimated at 48.3 million bags, down 3 percent from last year, but up 2 percent from the June forecast of 47.6 million bags. If realized, this region will account for 48 percent of the world's 1991/92 coffee output. African coffee outturn is estimated to be up 3 percent over last season and 4 percent above the June forecast. Asian coffee output is expected to be up 3 percent from last season, but down 3 percent from June. The estimate for the North and Central America regions for 1991/92, including the Caribbean, is up 4 percent from 1990/91 and 1 percent above the June forecast. The 1991/92 estimate is 2 percent below the record 1987/88 harvest of 103.2 million bags.

Brazil, the world's largest producer, harvested a crop of 28.5 million bags in 1991/92, up 500,000 from the June forecast, but 8 percent less than last year's 31.0 million bag crop. For 1991/92, Brazil's planted area of about 3.5 million hectares, or 4.2 million trees, is estimated to have increased slightly from a year ago. However, current projections indicate Brazil's harvest will be well below potential because weather conditions, combined with poor management practices, impeded the optimal development of the crop. A survey of coffee dehusking yields for the 1991/92 crop indicated they were near normal, falling within a range of 18 to 21.5 kilograms of de-husked coffee from a 40-kilogram bag of dried coffee cherries. Production, in millions of 60-kilogram bags, by producing state for the 1991/92 crop is estimated as follows: Parana 2.0; Sao Paulo 4.5; Minas Gerais 13.5; Espirito Santo 5.5; and other states 3.0.

In Colombia, coffee production for 1991/92 is estimated at a record 15.0 million bags, up 500,000 from the June forecast and the 1990/91 estimate. The expected rise from a year earlier is attributed to a 2-percent increase in area harvested. The expansion of coffee area has occurred steadily throughout the decade of the 1980's and appears likely to continue at least through the first half of the 1990's. Colombia currently has a coffee tree population of approximately 4.0 billion, up 2 percent from last year. Two coffee diseases still concern coffee authorities and growers in Colombia. Coffee rust has been a problem to growers since late 1983. Concern over coffee rust has intensified because the Coffee Growers Federation (CGF) eliminated its direct subsidization of coffee rust control in 1989. Prior to that time, CGF gave growers money to pay the additional labor costs involved in controlling the disease, as well as selling fungicide at subsidized prices. Currently, the CGF pays farmers a little more for their coffee and expects them to use the additional income to control coffee rust. Another menacing coffee disease is "broca". It first appeared in Colombia during 1988 in an unimportant coffee area near the border with Ecuador. From there, it spread to other coffee areas in the departments of Huila, Cauca, and Valle del Cauca, an important producing region. In November 1990, broca was discovered in Risaralda, the heart of Colombia's most significant coffee producing region. The CGF and the Colombian Agricultural Institute are continuing to conduct educational campaigns to instruct farmers on methods of preventing and eradicating broca.

In Indonesia, 1991/92 coffee production is estimated at 6.8 million bags, down 100,000 from the June forecast and 450,000 less than last year. The smaller output resulted from a combination of reduced harvested area and the lingering effects of drought throughout most of the major production areas. Unusually dry conditions reduced both yields and bean quality. Although Indonesia's total coffee tree population is expected to be up slightly from a year ago, to 1.3 billion, the Government's coffee production policy remains focused on rehabilitation and intensification of existing plantations rather than on further expansion.

Mexico's coffee production in 1991/92 is estimated at 4.8 million bags, 300,000 more than the June forecast and 1990/91. The upward revision reflects a significant recovery of coffee trees in the state of Puebla that were severely damaged by freezing temperatures in December 1989. Preliminary reports indicate adequate rainfall and good flowerings occurred in the main producing areas. This more than offset a 2-percent decline in Mexico's total coffee tree population, currently estimated at 850.0 million. Nearly one-half of Mexico's small coffee growers continue to receive support from INMECAFE, the National Solidarity Program (PRONASOL), and Mexico's government coffee marketing agency. Growers are provided subsidized production credits to expand coffee production. However, low international coffee prices are forcing many growers to reduce cultural practices and input utilization in order to trim production costs. Many producers farming in low-yielding areas are abandoning coffee production altogether, while maintenance and management practices are deteriorating in other areas. With reduced cultural practices, it is expected that production and yield differences between "on" and "off-year" cycles will be more noticeable over the next several years. A severe outbreak of "broca" infestation occurred last season on 20,000 hectares in Oaxaca. Broca was only found in Chiapas a few years ago, but because of the declining emphasis on cultural practices, coffee rust and broca currently infest about 80,000 hectares in Chiapas.

In Cote d'Ivoire, 1991/92 coffee production is estimated at 4.5 million bags, unchanged from the June forecast, but up 12 percent from the revised 1990/91 estimate of 4.0 million bags. The total coffee tree population remains virtually unchanged from a year ago at 1.8 billion trees. The projected production increase is due to a return to near-normal weather and actions taken by the Government of Cote d'Ivoire (GOCI) to liberalize marketing of the 1991/92 coffee crop. One of the Government's most important actions to liberalize coffee marketing entailed removing restrictions that prohibited farmers from de-hulling coffee cherries. The removal of these restrictions eased the farmers' discontent with de-hulling factories that stemmed from a widespread belief that factories were using quality control to unfairly lower purchase prices. In other measures, the GOCI no longer requires governmental approval for purchasing agents. Further, exporters are able to appoint as many agents as necessary who can buy unlimited quantities of beans, from any area, without restrictions on the amount that can be exported. The Government will maintain the same producer prices, quality premiums, and discounts for 1991/92 as in the previous year.



Ethiopia's 1991/92 coffee outturn is estimated at 3.5 million bags, 17 percent above the June forecast and the same as in 1990/91. For the past five years, the Ethiopian Government has estimated the coffee area at 321,000 hectares. According to the 1991/92 plan, coffee plantation area is projected to increase to 364,000 hectares, up 13 percent. Most of the area expansion is projected for state-farms. However, there remain major production constraints including the age of trees, coffee berry disease, insufficient support services, inadequate producer incentives, inefficient institutional arrangements, infrastructure-related problems, and lack of farmer participation in decision-making and implementation of relevant agricultural policies. Currently, Ethiopia is undergoing rapid political change. It is likely that any future Government will pursue a liberalized, deregulated coffee policy.

India's 1991/92 coffee production is estimated at 3.4 million bags, 100,000 less than previously forecast, but 430,000 more than produced in 1990/91. The decline from the June number was mainly due to severe late-season rains that marginally cut yields. However, in the major producing state of Karnataka, berry loss, due to heavy rains, has been minimal. Also, the incidence of the berry-borer pest has been limited to a few plantations around the Karnataka-Tamil Nadu border. It appeared for the first time in India last season. The pest bores through coffee seeds, and can damage up to 90 percent of a coffee crop. It has caused great losses in various Central African countries and in Sri Lanka.

Guatemala's 1991/92 coffee production is estimated at 3.2 million bags, down 6 percent from the June estimate and 1 percent below 1990/91. Because Guatemala's coffee tree population remains unchanged at about 700.0 million trees, the reduction primarily reflects declining fertilizer use by some producers as well as minor losses due to the recent drought. High production costs and low returns are expected to cause adjustments within the industry. Many producers may attempt to lower variable costs of production by further reducing fertilizer applications and moderating other cultural practices. The full effect of these adjustments will not be seen until the 1992/93 crop.

Uganda's 1991/92 coffee production is estimated at 3.0 million bags, unchanged from June, but up 300,000 from last year's outturn. The Ugandan Government began its coffee reform program in earnest during the 1990/91 season. Since July 1990, export competition was introduced, the Coffee Marketing Board restructured, the Crop Finance System was brought under control, and a new regulatory body was formed. These reforms have improved producer prices and dramatically improved robusta coffee quality. Uganda produces mostly robusta coffee from small holdings throughout the central part of the country, reaching from the slopes of Mount Elgon in the east, to the Nile in the northwest, and to Kigezi in the southwest.

## GREEN COFFEE: TOTAL PRODUCTION IN SELECTED COUNTRIES

(1,000 60-Kg Bags) 1/

Region and Country	1988/89	1989/90	1990/91	1991/92 June	1991/92 Dec 2/
<b>NORTH AMERICA</b>					
Costa Rica	2,758	2,453	2,565	2,680	2,680
Cuba	450	475	480	480	480
Dominican Republic	726	756	608	725	725
El Salvador	1,492	2,787	2,402	2,500	2,400
Guatemala	3,022	3,472	3,282	3,440	3,250
Haiti	479	527	580	600	600
Honduras	1,635	1,928	1,685	1,665	1,800
Jamaica & Dep	14	19	26	30	30
Mexico	5,500	5,100	4,550	4,550	4,850
Nicaragua	714	743	454	500	580
Panama	200	220	260	260	260
Trinidad and Tobago	20	15	15	15	15
United States 3/	254	279	285	285	290
<b>TOTAL</b>	<b>17,264</b>	<b>18,774</b>	<b>17,192</b>	<b>17,730</b>	<b>17,960</b>
<b>SOUTH AMERICA</b>					
Bolivia	195	258	342	350	350
Brazil	25,000	26,000	31,000	28,000	28,500
Colombia	10,700	13,300	14,500	14,500	15,000
Ecuador	2,150	2,150	1,850	1,900	1,800
Guyana	5	5	5	5	5
Paraguay	410	430	340	400	400
Peru	1,400	1,400	1,150	1,300	1,150
Venezuela	1,127	1,075	843	1,100	1,100
<b>TOTAL</b>	<b>40,987</b>	<b>44,618</b>	<b>50,030</b>	<b>47,555</b>	<b>48,305</b>
<b>AFRICA</b>					
Angola	200	170	170	170	170
Benin	40	35	35	35	35
Burundi	605	616	517	550	550
Cameroon	1,760	1,440	1,365	970	990
Central African Rep.	355	300	350	350	350
Congo	25	25	25	25	25
Cote d'Ivoire	3,989	4,734	4,000	4,500	4,500
Equatorial Guinea	15	15	15	15	15
Ethiopia	3,300	3,400	3,500	3,000	3,500
Gabon	35	30	30	30	30
Ghana	17	17	35	35	35
Guinea	100	125	125	125	125
Kenya	1,960	1,740	1,502	1,600	1,650
Liberia	82	40	30	30	30
Madagascar	1,100	1,100	1,100	1,000	1,150
Malawi	72	95	90	90	90
Nigeria	90	95	90	90	90
Rwanda	679	561	619	660	660
Sierra Leone	92	100	100	100	100
Tanzania	957	851	830	820	820
Togo	300	300	300	300	300
Uganda	3,300	2,500	2,700	3,000	3,000
Zaire	1,750	2,000	1,695	1,640	1,640
Zambia	10	15	15	15	15
Zimbabwe	175	225	225	225	225
<b>TOTAL</b>	<b>21,008</b>	<b>20,529</b>	<b>19,463</b>	<b>19,375</b>	<b>20,095</b>
<b>ASIA</b>					
India	3,590	2,150	2,970	3,500	3,400
Indonesia	6,750	7,100	7,250	6,900	6,800
Malaysia	75	75	75	75	75
Philippines	1,350	1,149	970	1,300	1,100
Sri Lanka	75	70	75	75	75
Thailand	1,025	800	900	1,000	1,000
Vietnam	922	985	1,200	1,350	1,350
Yemen	65	65	65	65	65
<b>TOTAL</b>	<b>13,852</b>	<b>12,394</b>	<b>13,505</b>	<b>14,265</b>	<b>13,865</b>
<b>OCEANIA</b>					
New Caledonia	6	5	5	5	5
Papua New Guinea	1,175	1,092	964	1,000	825
<b>TOTAL</b>	<b>1,181</b>	<b>1,097</b>	<b>969</b>	<b>1,005</b>	<b>830</b>
<b>WORLD TOTAL</b>	<b>94,292</b>	<b>97,412</b>	<b>101,159</b>	<b>99,930</b>	<b>101,055</b>

1/ One bag = 132.276 pounds.

2/ Coffee marketing year begins October in some countries and April or July in others.

3/ Includes Puerto Rico and Hawaii.

NOTE: Production estimates for some countries include cross-border movements.

December 1991

Production Estimates and Crop Assessment Division, FAS, USDA



## CITRUS PRODUCTION SITUATION FOR 1990/91 AND 1991/92

Commercial citrus production in selected major producing countries for 1990/91 is estimated at 49.0 million tons, up 1 percent from June 1991 and 2 percent over 1989/90. Northern Hemisphere 1991/92 production is forecast at 32.0 million tons, down 1 percent from the revised 1990/91 production of 32.3 million tons. Forecasts for 1991/92 show gains by only three major producers -- the United States, Italy, and Turkey -- but these increases are not large enough to offset declines in Spain, Mexico, Greece, Israel, Morocco, and Japan.

Preliminary forecasts for 1991/92 indicate Northern Hemisphere countries will decrease production of all major citrus crops. Oranges are off 1 percent to 19.5 million tons, tangerine production is down by 4 percent to 5.3 million, grapefruit output is expected to fall 5 percent to 2.9 million, and lemons will drop 2 percent to 2.5 million. Production of other types of citrus is expected to remain unchanged at 1.5 million tons.

Citrus production in the United States for 1991/92 is projected up 4 percent to 10.7 million tons. Production was expected to be higher because initial assessments indicated a substantial recovery from the 1990 freeze in California and a normal crop in Florida; however, this did not happen. The Florida orange and grapefruit crops were below expectations due to below normal fruit setting caused by unfavorable weather last spring. Orange production for 1991/92 is projected at 7.8 million tons, up 7 percent over last year due to the recovery in California, where output is expected to be double the 1990/91 freeze-damaged crop. The Florida orange crop, which normally accounts for three-quarters of domestic production, is estimated down by 10 percent. Grapefruit is projected down 5 percent because of the smaller Florida crop. Trees in Texas are expected to produce only a small commercial crop in 1991/92. The entire 1990/91 crop was lost during the 1989/90 freeze.

Mexican citrus production for 1991/92 is projected at 3.3 million tons, down 7 percent from 1990/91 because of unfavorable weather during the first, and most important, flowering period last season.

The Spanish citrus production estimate for 1990/91 has been revised to 4.7 million tons, up slightly from the June projection. The 1991/92 crop is estimated at 4.4 million tons, down 7 percent from 1990/91. A cold spring caused fruit-set to be below normal and the unusually hot summer resulted in above normal fruit drop. Orange production for 1991/92 is forecast at 2.5 million tons, down 3 percent from the 1990/91 level. Tangerine production is forecast at 1.3 million tons, down 12 percent from the 1990/91 level. Lemon production for 1991/92 is forecast at 527,000 tons, down 15 percent from the revised 1990/91 crop of 620,000 tons.

Greek citrus production for 1990/91 is estimated at 1.1 million tons, unchanged from the June projection. For 1991/92, production is forecast to fall 12 percent to 939,000 tons due to a second consecutive year of drought. Orange production for 1991/92 is forecast at 703,000 tons, down 14 percent from 1990/91; while, lemon production is forecast at 150,000 tons, down 11 percent from 1990/91. These projected reductions reflect drought and freeze damage during blossoming. In some orange groves, production was down 50 percent. In contrast, tangerine production is forecast up slightly to 75,000 tons because of that crop's greater cold tolerance.

Italian citrus production for 1990/91 is forecast at 2.9 million tons, down slightly from the June estimate. For 1991/92, production is projected at over 3.2 million tons because of improved weather conditions. Orange production for 1991/92 is projected at 2.0 million tons, up 4 percent from 1990/91. Tangerine production is projected up 12 percent from 1990/91 to 0.5 million tons and lemon production is projected up 10 percent from 1990/91 to 0.7 million tons.

Japanese citrus production for 1991/92 is forecast to fall 4 percent to 2.1 million tons due to a September typhoon that caused serious damage. The 1991/92 tangerine crop (90 percent of all Japanese citrus production) is in an "on year" for this alternate bearing crop, but the storm drastically cut expected yields.

Israeli citrus production for 1991/92 is forecast at 1.0 million tons, 9 percent below last year's revised production of 1.1 million. The 40-percent reduction in water quotas for fruit orchards since September 1990 has forced growers to concentrate on more valuable products, like pink grapefruit, and reduce irrigation on less productive groves.

Egyptian citrus for 1991/92 is forecast at 2.3 million tons, up slightly from the revised 1990/91 estimate. The 1990/1991 crop was revised upward because of an increase in harvested area and yields. Gaza citrus production for 1991/92 is forecast at 142,000 tons, up slightly from the revised 1990/91 crop of 137,000.

For Morocco, 1991/92 production is forecast down about 25 percent to 1.1 million tons, from a revised 1990/91 crop of 1.5 million due to a sharp drop in orange production. The decline for 1991/92 occurred because of the large 1990/91 crop, cold weather in the March blossoming period, and high fruit drop during April, May, and June because of high temperatures. Orange production is forecast down 28 percent to 790,000 tons, while tangerines are down 8 percent to 284,000 tons.

Turkey's 1991/92 citrus crop is forecast at 1.6 million tons, up 9 percent from a revised 1990/91 crop of 1.5 million tons. Production for all citrus is projected to increase, except for tangerines that were affected by heavy rains during blossoming. In Cyprus, both the 1991/92 citrus crop and revised estimates for 1990/91 are down slightly due to continued drought.

The Southern Hemisphere 1990/91 citrus crop has been revised downward slightly since June, to 16.7 million tons. The downward revisions are due to reduced orange production in Argentina and all citrus types in South Africa.

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Arthur Hausmann (202) 720-8883



TABLE 20

CITRUS PRODUCTION  
(1,000 METRIC TONS)

	1987/88	1988/89	1989/90	1990/91	1991/92 1/
<hr/>					
CUBA					
Oranges	508	474	604	600	600
Tangerines	25	26	17	15	15
Grapefruit	285	385	264	332	332
Citrus, other	80	62	69	66	66
TOTAL	898	947	954	1,013	1,013
CYPRUS					
Oranges	138	170	223	174	173
Tangerines	6	11	12	12	10
Grapefruit	96	115	118	118	100
Lemons	46	63	66	54	50
TOTAL	286	359	419	358	333
EGYPT					
Oranges	1,387	1,199	1,397	1,574	1,600
Tangerines	134	151	170	257	265
Grapefruit	2	2	2	2	2
Lemons	2	2	2	2	2
Citrus, other	138	190	240	410	420
TOTAL	1,663	1,544	1,811	2,245	2,289
GAZA STRIP					
Oranges	83	98	171	116	120
Grapefruit	10	14	13	11	12
Lemons	12	13	13	10	10
TOTAL	105	125	197	137	142
GREECE					
Oranges	462	770	932	819	703
Tangerines	49	69	75	74	75
Grapefruit	5	6	7	7	7
Lemons	89	170	189	169	150
Citrus, other	3	4	4	4	4
TOTAL	608	1,019	1,207	1,073	939
ISRAEL					
Oranges	627	546	877	567	550
Tangerines	122	90	127	92	97
Grapefruit	314	353	373	384	317
Lemons	47	37	40	36	37
Citrus, other	14	16	25	25	25
TOTAL	1,124	1,042	1,442	1,104	1,026
ITALY					
Oranges	1,343	2,170	2,067	1,820	2,000
Tangerines	333	411	476	445	500
Grapefruit	3	7	8	7	9
Lemons	592	708	667	620	680
Citrus, other	42	18	38	39	40
TOTAL	2,313	3,314	3,256	2,931	3,229
JAPAN					
Oranges	67	58	54	50	43
Tangerines	2,941	2,387	2,375	1,993	1,915
Lemons	2	2	2	2	2
Citrus, other	288	227	201	170	160
TOTAL	3,298	2,674	2,632	2,215	2,120
<hr/>					

FOOTNOTES AT END OF TABLE

CONTINUED

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CITRUS PRODUCTION  
(1,000 METRIC TONS)

CONTINUED

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CITRUS PRODUCTION  
(1,000 Metric Tons)

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1/ December 1991 Estimate unless otherwise noted. 2/ Estimate previously reported.

December 1991      Production Estimates and Crop Assessment Division, FAS, USDA



## MONGOLIAN AGRICULTURAL SITUATION

Mongolia is a large, landlocked, and thinly-populated country located between China and the Soviet Union. Larger than Alaska, its terrain is mostly flat and rolling semi-arid grasslands framed by mountains in the west and southwest and the Gobi Desert in the southeast. It has a continental climate with sharp seasonal variations and extremely cold winters. The majority of Mongolia's 2 million people are engaged in agricultural production -- mainly livestock, wheat, oats, barley, and potatoes. The rural population is generally self-sufficient, but, for many years, the expanding urban population has depended upon a socialist distribution system for all of their food. Since 1990, Mongolia has taken several steps toward building a market-oriented economy, but the transition has been difficult, especially in the agricultural sector.

### LIVESTOCK AND DAIRY PRODUCTS

Meat and dairy products, along with bread, form the basis of the traditional Mongolian diet. Mongolia has roughly 25 million head of livestock (about 60 percent sheep), including 9.3 million born in 1991. Legal limits on individual livestock ownership were abolished in June 1990 and now 30-40 percent of all animals are privately owned. Dairy farm privatization is scheduled for the end of 1991. Although these changes are expected to strengthen the livestock sector in the long-run, many rural Mongolians are opposed to private ownership because they fear the economy is too unstable or that their interests could be hurt under the new system.

Despite the large number of animals, there was a shortage of meat for urban consumers this year because of a breakdown in the movement of meat and livestock to market. According to Mongolian government statistics, meat production for the first-quarter of 1991 was only 35 percent of first-quarter 1990 production and serious meat shortages were reported in major cities during the summer. Livestock slaughtering normally increases in the fall, but many herders refused to sell their stock this year because of low procurement prices and the lack of consumer goods available for purchase with the receipts. Meanwhile, forecasts of severe weather this winter led herders to keep inventories high in order to absorb the expected winter losses. Fodder supplies are short in the north and west where livestock retention is highest, so the result could be higher animal losses and severe meat shortages in the spring.

Milk supplies are also short this year. In August, the Mongolian State Statistical Bureau reported that milk production in the first-half of 1991 was just 80 percent of 1990 levels (17.6 verses 21.9 million liters). Suppliers blamed dairies for under-producing, while dairies blamed inadequate storage and transport facilities for the decline. The situation does not seem likely to improve soon.



## GRAINS

Mongolia's grain crop (primarily spring wheat, with lesser amounts of barley and oats) is grown in the river valleys in the northern part of the country. Mongolia's farmers originally planned to sow 619,000 hectares of wheat in 1991, but actual sown area was probably closer to 500,000 hectares because of poor weather at planting. In July, Mongolian authorities estimated wheat production at 736,000 to 750,000 tons, but summer drought and the lack of fertilizer, pesticides, and herbicides caused a reduction in yields. Rain, early frost, and shortages of labor and materials delayed the harvest and hurt crop quality. By the end of October, the wheat estimate was reduced to 625,000 tons, but the final estimate put total production at only 590,000, down 25 percent from the target of 790,000. Production of potatoes, vegetables, and grains are also expected to fall below Government targets. Post-harvest losses are normally serious since grains and vegetables usually are transported without protection from the elements and stored without proper drying. One expert estimated that 40 percent of potatoes and up to 60 percent of other vegetables and fruits are lost in storage.

## CURRENT ECONOMIC CONDITIONS

Reportedly, Mongolia is now in the midst of a food crisis, the result of fundamental economic changes caused by the shift to a market economy in 1990. As in some other centrally-planned economies, the former socialist administration has largely disintegrated but few free market mechanisms have emerged to take their place. The Mongolian economy is in poor shape. Domestic production is falling, businesses are closing, and unemployment is rising. A lack of hard currency and the collapse of barter trade with its neighbors has seriously affected both exports of Mongolian commodities and imports of vitally needed items such as food, fuel, and fertilizer. Imports of consumer goods and food in 1991 are down sharply from last year. Local governments are now responsible for managing the harvest, but with no clear direction from the Central Government, food is not getting to where it is most needed. In recent months, the country has sought emergency food aid from the United States and other donor countries, but Mongolia's isolation and economic problems have made the delivery of aid difficult.

Since last January, the Government has been forced to impose rationing on meat, butter, cooking oil, rice, sugar, tea, flour, vodka, and soap. However, rationed goods are in short supply and often insufficient to fulfill the basic minimum needs. The meat ration is only 90 grams/day per person, much lower than normal consumption. Sugar and rice are disappearing from the market. Cooking oil has been in short supply since this summer, and even the supply of non-rationed food, like milk, is said to be inadequate. Per capita consumption of food fell last year. Mongolians now eat about one-third of the meat and sugar, 60 percent of the flour, and less than one-half of the rice they consumed 2 years ago. Senior Mongolian officials have said they believe supplies of meat, milk, and bread should be adequate for the winter, but the future is uncertain. Although they anticipate that the transition to a market-oriented economy will eventually improve Mongolia's agricultural sector, food shortages and distribution problems are not expected to disappear.



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